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# INTERNATIONAL COTTON BULLETIN

Official Organ of the International Federation of Master  
Cotton Spinners and Manufacturers Associations, Manchester



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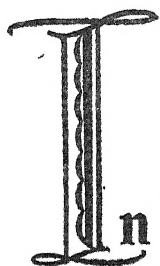
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**GHEENT (Belgium)**  
Societe Co-operative "La Textile" .. Rue Savaen, 56

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Messrs. Oscar Wilkens & Co. .. ..I. Schottenring, 23

**WINTERTHUR (Switzerland)**  
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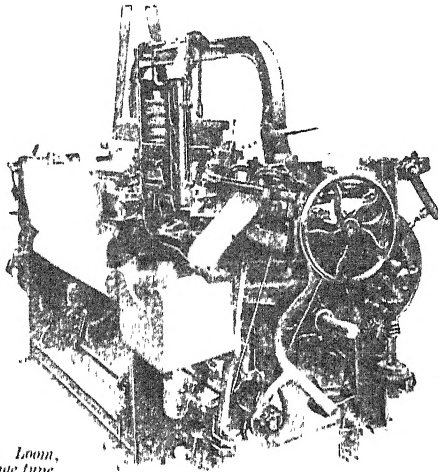
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	PAGE		PAGE
ADOLF, EMIL, A. G. . . . .	203	LANCASTER & TONGE . . . . .	307
ALBRECHT, F., & Co. . . . .	239	LAWLER, H. H., & Co. . . . .	44
ALEXANDRIA COMMERCIAL Co. . . . .	153	LEES, ASA, & Co., LTD. . . . .	108
AMERICAN COTTON GROWERS' EX- CHANGE . . . . .	front cover	LIVERPOOL COTTON ASSOCIATION . . . . .	224
ANDERSON, CLAYTON & Co. . . . .	25	LORD BROS., LTD. . . . .	93
AUGUSTINO, P., & Co. . . . .	155	MACMILLAN & Co., LTD. . . . .	210
BAER, HENRY, & Co. . . . .	228	MANCHESTER RAW COTTON CO., LTD. . . . .	239
BARBER & COLMAN, LTD. . . . .	109	MANCHESTER SHIP CANAL CO. . . . .	4
BARCELONA INTERNATIONAL EX- HIBITION . . . . .	x	MATTHEWS & YATES, LTD. . . . .	223
BEHR, OTTO . . . . .	37	MEYNELL, HENRY, & Co. . . . .	96
BOND, MCENANY & Co. . . . .	184	MUNDS & WINSLOW . . . . .	20
BRITISH NORTHROP LOOM CO., LTD., THE . . . . .	101	MURRAY GIN CO. . . . .	38
BROOKS & DONEY (1920), LTD. . . . .	95	NEAL, W. C. . . . .	19
BUNGE & BORN, LDA. . . . .	203	NEUBURGER COTTON COMPANY . . . . .	x
CIACHATY FRERES . . . . .	238	PELLEGER, PAUL, & Co. . . . .	50
CITY WAREHOUSE WINDOW CLEAN- ING CO., LTD. . . . .	181	PLATT BROS. & Co., LTD. . . . .	235
"COMMERCE & FINANCE" . . . . .	31	PORT OF MANCHESTER WAREHOUSES . . . . .	211
COMTELBURRO, LTD. . . . .	183	PUGH-LYONS & Co. . . . .	3
CONTINENTAL GIN COMPANY . . . . .	143	REED, M. H., & Co. . . . .	49
COOK, THOS., & SON, LTD. . . . .	107	REINHART & Co. . . . .	117
COOPER, JAMES, LTD. . . . .	184	REYNOLDS & GIBSON . . . . .	31
CRÉDIT GÉNÉRAL DE BELGIQUE . . . . .	20	RIEIER & Co., JOHN JACOB . . . . .	102
"CASTLE LINE" . . . . .	49	RÜTI MACHINE CO. . . . .	108
DAVISON'S TEXTILE BLUE BOOK . . . . .	57	SALVAGO, C. M., & Co. . . . .	156
DEAN & DAWSON, LTD. . . . .	233	SCOTT & Co. . . . .	49
DELTA & PINE LAND CO. . . . .	43	SKINNER, THOS., & Co. . . . .	224
DISTRICT BANK, LTD. . . . .	213	SOC. ALSACIENNE DE CONSTRU- CTIONS MÉCANIQUES . . . . .	231
DIXON, R. L., & BROTHER . . . . .	58	SOUTHERN COTTON COMPANY . . . . .	240
DOBSON & BARLOW, LTD. . . . .	202	STANDARD MARINE INSURANCE CO. . . . .	150
DODD, S., & SONS . . . . .	232	STEWART BROTHERS COTTON COM- PANY . . . . .	41
DRAPER CORPORATION . . . . .	20	STUBBS, JOSEPH, LTD. . . . .	239
ECONOMOU, G. D., & Co. . . . .	155	TARVER, STEELE & Co. . . . .	58
EGYPTIAN PRODUCE TRADING CO. . . . .	151	TAYLOR, LANG & Co., LTD. . . . .	239
ESTRADA, N. . . . .	44	TEHLOW, HENRY, & SONS . . . . .	120
FAWCETT PRESTON & Co., LTD. . . . .	223	TEXAS FARM BUREAU . . . . .	37
FERRAND, F. . . . .	101	"TEXTILE, LA," SOCIÉTÉ CO- OPÉRATIVE . . . . .	231
FLOYD, WILLIS & Co. . . . .	37	"TEXTILE WEEKLY" . . . . .	214
FRANÇOIS, L. F., & CIE. . . . .	58	TRIPIEX SPINNING FRAME . . . . .	101
GREER STAPLE COTTON COMPANY . . . . .	50	TWEEDALES & SMALLEY (1920), LTD. . . . .	237
HETHERINGTON, JOHN, & Co., LTD. . . . .	238	UNIVERSAL WINDING CO. . . . .	vi
HOWARD & BULLOUGH, LTD. . . . .	229	VICKERS (CRAYFORD), LTD. . . . .	111
HUDSPETH, G. J., & Co. . . . .	43	WELD & Co. . . . .	213
HUSNI, SONS & CHINASSI . . . . .	233	WESTERN UNION TELEGRAPH CO. . . . .	37
JOANNIDES, J. G., & Co. . . . .	158	WILCOCK BROS. . . . .	99
JONES, A. LYNTON, & Co. INC. . . . .	37	WILLIS, FLOYD & Co. . . . .	37
KENYON, JAMES, & SON, LTD. . . . .	234	WILSON BROS. BOBBIN CO., LTD. . . . .	227
KNOWLES, PEERS . . . . .	102	WOOLLEY, JAMES, SONS & Co., LTD. . . . .	181
KUPPER, H. . . . .	155	WORRALL, JOHN, LTD. . . . .	120

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# CONTENTS

	PAGE
COMMITTEE'S COMMUNICATIONS . . . . .	1-3
EXTRACTS FROM MINUTES, INTERNATIONAL COMMITTEE MEETING, AMSTERDAM, 1, QUARTERLY STATISTICS, 2, REPORT BY THE GENERAL SECRETARY ON HIS 1928 AMERICAN JOURNEY, 3, BARCE- LONA CONGRESS ARRANGEMENTS, 3	
STATE OF TRADE REPORTS . . . . .	4-5
REPORT ON THE 1928 JOURNEY THROUGH U.S.A., by	
ARNO S. PEARSE . . . . .	9-131
SYNOPSIS . . . . .	9-13
UNITED STATES COTTON MILL INDUSTRY . . . . .	10-17
SPINDLES, 16; LOOMS, 16; NUMBER OF OPERATIVES, 18; U.S.A. EQUIVALENT COTTON MACHINERY, 21; PRODUCTION, 21; STATE OF TRADE, 23; COTTON GOODS EXPORTS FROM U.S.A., 23; COTTON GOODS IMPORTS INTO U.S.A., 27; CONCLUSIONS AFTER MILL VISITS, 28; SPINNING, 29; WEAVING, 29; STAFFORD LOOM, 30, DRAPER LOOM, 29-34; GENERAL MILL NOTES, 35-39; TAXATION OF COTTON MILLS IN U.S.A., 39; WAGES AND LABOUR, 39-40; LEGAL WORKING HOURS IN U.S.A., 41; TRADE UNIONISM, 42-51; PSYCHOLOGY IN COTTON MILLS, 51-53; NEW USES OF COTTON, 53-61; HEDGING MANUFACTURERS' STOCK, 61; INSTALMENT SYSTEM, 60; COTTON MILL COSTINGS, 67.	
RAW COTTON . . . . .	73-99
GOVERNMENT CROP REPORT, 73; OUR COTTON CROP REPORT, 77; STAPLE PREMIUMS, 78; CARRY-OVER, 79; CO-OPERATIVE ASSOCIA- TIONS, 80; ROUND BALES, 82; AVERAGE COST OF COTTON PRODUCTION, 83; GREER STAPLE BREEDING FARM, 84; STANDARDS FOR STAPLE, 85; VARIATION IN TEXAS STAPLE, 88; MECHANICAL PICKERS, 89.	
APPENDIX . . . . .	91-131
NOTES ON THE MILL INSPECTION TOUR, 91; WINDING, 92; BARBER COLMAN SPOOLERS AND HIGH-SPEED WARPERS, 97; STAFFORD LOOM, 98; MACHINES, SPEED AND PRODUCTION, 110; LABOUR, 112; COSTINGS, 113; CHICOPER MILL, 120, U.S.A. EXPORTS OF COTTON CLOTH, 132.	
ADDRESS BY MR. H. WINDFELD-HANSEN . . . . .	134-139
WHAT HAPPENS, 139; BUREAU COTTON CROP REPORTS, 140; GRADE AND STAPLE OF GINNINGS, 142; MARKET LETTER, 141.	
EGYPTIAN COTTON . . . . .	145-160
JOINT COMMITTEE, 145; REVIEW 1927-28 SEASON AND PROS- PECTS, 146, MARKET LETTERS, 156; EXPORTS, 158; SUDAN COTTON CROP, 160.	

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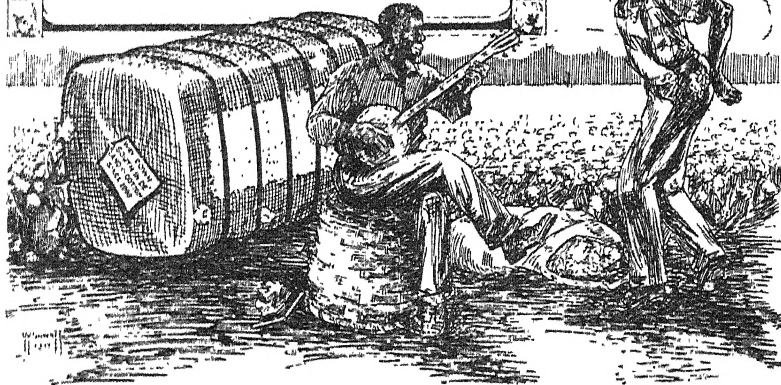
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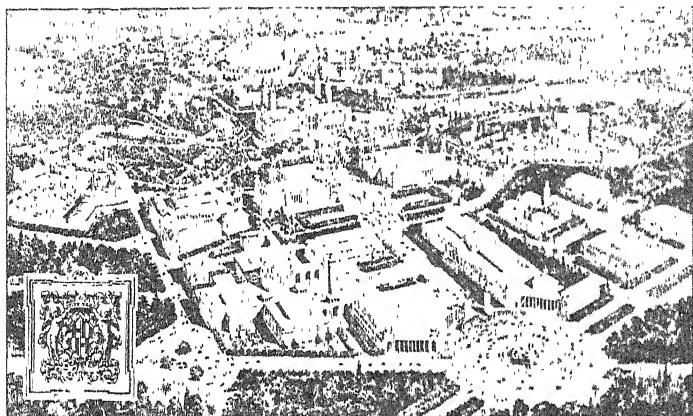
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# INTERNATIONAL COTTON BULLETIN

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November, 1928

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## COMMITTEE'S COMMUNICATIONS.

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### EXTRACTS from the MINUTES of MEETINGS of the INTERNATIONAL COTTON COMMITTEE, held at the Amstel Hotel, Amsterdam, on October 22nd and 23rd, 1928.

At the Opening Meeting on Monday, the 22nd October, there were present: Messrs. F. Holroyd (in the chair), Lt.-Col. N. Seddon Brown, F. A. Hargreaves and William Howarth (England), Johannes Elster and Dr. W. Böhm (Germany), Paul Schlumberger, Roger Seyrig and R. A. de la Baumelle (France), Dr. A. Zucker (Czecho-Slovakia), Holger Sebbelov and H. Windfeld-Hansen (Denmark), H. P. Taveira and Manoel Pinto d'Azevedo (Portugal), A. E. Hakanson (Sweden), Count de Hemptinne and R. Brasseur (Belgium), John Syz and Caspar Jenny (Switzerland), Joan Gelderman (Holland), Arthur Kuffler (Austria), Dr. G. Mylius (Italy), Eduardo Bilkstad (Norway), and Arno S. Pearce, General Secretary, and John Pogson, Assistant Secretary.

The Chairman cordially thanked Mr. Gelderman for the excellent arrangements which he had made in connection with the meetings. He welcomed the delegates and particularly Mr. Windfeld-Hansen (Denmark) and Mr. Manoel Pinto d'Azevedo (Portugal), who attended for the first time as substitutes for the respective permanent members of their countries.

Letters of regret for inability to attend had been received from Mr. Santiago Trias (Spain), Mr. M. Lavonius (Finland), Mr. Otto Lindenmeyer (Germany), Mr. K. Shimada (Japan) and Mr. Robert Szurday (Hungary). In view of Mr. Lindenmeyer's illness the meeting expressed sympathy and regret and asked

Dr. Bohm to convey to him the wishes of the Committee that he would soon be restored to health.

The Chairman mentioned the holding of the Joint Egyptian Cotton Committee Meetings at Zurich on June 14th and 15th, 1928, and the publication by the International Federation of the report on the Secretary's journey through Colombia.

#### QUARTERLY STATISTICS OF COTTON CONSUMPTION, COTTON MILL STOCKS AND SPINDLES.

The Austrian Association having put forward the suggestion that the statistics relating to mill consumption, mill stocks and spindles should be compiled and published quarterly, instead of half-yearly as a present, a lengthy discussion took place. It was pointed out that a private agency was in the habit of issuing monthly statistics of a similar kind on the basis of a few returns from individual spinners in each country.

After an exchange of opinions the following resolution was adopted :-

"That the representatives on the International Committee be instructed to ascertain from their affiliated Associations, whether they are in favour or otherwise of the present statistics being issued quarterly instead of half-yearly, that they report the result to the Central Office in Manchester, and that a decision in the light of the opinion thus obtained be taken at the next meeting of the International Committee."

It was reported that the International Chamber of Commerce was proceeding to appoint a Consultative Committee for the purpose of securing an extension of statistics concerning the International Cotton Industry, which duty had been entrusted to them by the League of Nations, and that several representatives of the International Cotton Committee had been nominated to serve on that Committee to co-operate in the work.

A long discussion ensued and eventually the following resolution was adopted :-

"That this International Cotton Committee is willing to supply to the International Chamber of Commerce such statistical information as it collects and to give due consideration to any suggestions which may be made by the International Chamber of Commerce. It is, however, to be distinctly understood that the International Cotton Committee considers itself the only authority representative of the cotton industry. The Committee is therefore of opinion that all co-operation of this nature should be carried out only by the duly appointed officers of the International Cotton Federation and urges that the members of the International Committee should conform to these views."

#### REPORT ON THE 1928 JOURNEY THROUGH U.S.A. BY ARNO S. PEARSE.

The Committee, through the President and Vice President, expressed its high appreciation of the Report on the U.S. Cotton Mill Industry and on Raw Cotton, prepared by the General

Secretary; warm thanks were accorded to him for the able manner in which he had placed the results of his recent journey in U.S.A. before the Committee.

Mr. Pearse gave a synopsis of the report which had previously been circulated in proof form, and a most interesting discussion followed.

Mr. H. WINDFELD-HANSEN (Denmark), who had obtained special knowledge of the technical side of the American cotton industry, spoke at length of the various characteristics of the U.S. cotton industry, especially dealing with ring spinning. Mr. Windfeld Hansen, who spoke in terms of praise of Mr. Pearse's report and with whose declarations he generally agreed, was thanked for his interesting remarks.

It was decided to print in the BULLETIN a full copy of Mr. Hansen's remarks.

[Both Mr. Pearse's Report and Mr. Windfeld-Hansen's remarks appear in this issue of the INTERNATIONAL COTTON BULLETIN immediately following these minutes.]

It was agreed that a questionnaire be issued to each affiliated Association, asking for information relating to automatic looms.

#### RAW COTTON REPORTS.

Mr. Pearse then briefly commented upon the salient points referred to in the second part of his report dealing with Raw Cotton.

The report was unanimously adopted.

It was resolved to grant permission to Mr. Pearse to lecture before the members of affiliated associations on his recent investigations, on the understanding that his expenses are borne by the individual associations requiring his services.

#### VISIT TO AMERICA NEXT YEAR.

In consequence of the fact that the General Secretary would be engaged at the Barcelona Congress next year he would himself be unable to pay a visit to America similar to what he had done during the last five years.

In view of this it was decided that Mr. Norman Pearse be empowered to visit the United States next year.

#### BARCELONA CONGRESS ARRANGEMENTS.

The following arrangements were made for the next International Cotton Congress, to be held in Barcelona by invitation of the Spanish Association:—

The date of opening the Congress was provisionally fixed for approval of the Spanish Association as Monday or Tuesday, 16th or 17th September, 1929.

The agenda for the Congress was considered and the subjects to be dealt with thereat. Although the following subjects were suggested, the final list of subjects was left over until the next meeting of the International Committee (Brussels, May, 1929):—

- (a) Various systems of cotton-mill costings.
- (b) New uses of cotton and how best to increase demand.
- (c) Specialization of labour in cotton mills.
- (d) Matters connected with Egyptian cotton, to be fixed by the Egyptian Sub-committee.

It was decided that Mr. C. O. Moser, President of the Co-operative Cotton Farmers' Associations of America, be invited to address the Congress on the activities of his organization.

The kind offer of Mr. Wm. Howarth to loan a film for exhibition during the period of the Congress, showing the latest phases of cotton spinning and weaving and finishing, was accepted.

It was resolved to suggest to the Barcelona Exhibition authorities the desirability of organizing a mannequin parade featuring cotton fabrics during the Congress.

### STATE OF TRADE REPORTS.

Reports on the state of trade in the various countries were presented as follows:—

#### AUSTRIA.

During June and July the lowest point of depression was reached. Since August, however, business has improved in quantity, but the margin leaves much to be desired.

The position has been influenced by the competition of Italy in the Balkan States on the one hand and the falling-off in exports to Germany on the other.

The weaving industry in Austria, although not fully developed, is not in a satisfactory position. Since the Custom House Tariff was adjusted for finer class goods, sales have been better for coloured goods and finer cloth productions.

#### BELGIUM.

During the past six months the position of trade has been unsatisfactory and losses have been incurred in the spinning section owing to prices having been unfavourable. The stocks on hand are negligible. Latterly, however, the situation has improved somewhat.

In the weaving section business is much better, and there is more demand.

Wages have increased by 5 per cent. since the last report owing to the cost of living having increased.

#### CZECHO-SLOVAKIA

Since the end of last year production in spinning in the American section has fallen off to the extent of 20 per cent. and margins have diminished by 25 per cent., so that there are at the moment very few mills working without loss. The Egyptian and Indian sections are doing a little better, but are far from satisfactory.

The position is somewhat similar in the weaving section, but few firms are running at a profit. A better position obtains for firms engaged in the manufacture of hosiery, but only then in cases where artificial silk is in use.

## DENMARK.

The employment within the Danish cotton industry has also for the present year been unsatisfactory and on an average too limited to make production profitable. For the spinning and weaving mills the average employment has been practically 60 per cent. of the normal capacity, somewhat more for the spinning mills but less for the weaving mills. When the spinning mills have been able to work on a fairly paying basis it is due to the fact that they have been recompensed for the reduced yarn sale to the weaving mills by an increased sale of yarn to the hosiery industry, the production of which has been increasing during the later years, thanks to the still dominating fashion for hosiery fabrics.

The wages agreement with the workers remains unchanged since August, 1927, as the Danish price index since then has been unaltered. The comparative position to-day is 176 points as against 100 points in July, 1914.

## ENGLAND.

*Spinning.* The *American* spinning section of the trade remains under a cloud, although hope is not absent that a better state of affairs will obtain in the not far distant future. Efforts are being made on the lines of amalgamation of interests to reorganize and rehabilitate this section of the industry. The actual production as compared with normal is between 70 and 80 per cent.

In various directions, efforts are being made to reduce the costs of production to an economic level.

Since the last meeting of the Committee the *Egyptian* spinning section of the trade has experienced a worse period than for a considerable time. At the end of March last, trade was severely tested, due to the fact that the price of cotton then being used was out of all parity with competitive growths.

There has, however, been a considerable broadening of demand during the last two months. Most spinners of Egyptian yarns have sold equal to one and a half weeks' production in each week during the past two months. From all evidences at present it would appear that margins will begin to show themselves before long.

*Weaving.* In the manufacturing section trade has been far from satisfactory. Seventy to eighty per cent. of looms are running. A considerable number of looms have gone out of commission. There are, however, signs of improvement and although there is not a great deal of business being booked there is a large amount of enquiry. On the whole there is hope of a slight improvement manifesting itself.

No alteration in the wages of the workpeople has taken place since the last report.

**FRANCE.**

Whilst the position of Egyptian spinners may be regarded as being fair, the American spinners have been losing money for the past twelve months. The capacity of production has been 75 to 80 per cent., principally owing to the shortage of labour.

In the weaving section, whilst matters have improved they are still far from being satisfactory. There is actually a better demand, owing to the fact that the winter season always brings orders. Its maintenance, however, is uncertain. The prospects, on the whole, are not very good.

Wages continue to soar to bring them in conformity with the stabilization of money.

**GERMANY.**

*Spinning.* The German cotton-spinning industry is in a very bad state at present and can sell only at prices which show a loss. The improvement which was expected for this autumn has not taken place. Moreover, the German textile industry is expecting some severe wages disputes.

*Weaving.* Since our last report at the beginning of July in the South German weaving industry no improvement can be recorded. On the other hand no further reduction of importance in the working time has taken place. The production is about average 75-85 per cent. of normal, but even this production has not been fully sold. A large part of it has gone into stock, so that stocks are increasing all round. The trade at the beginning of the year was very much overbought; it had made contracts for a large part of the year. On account of this enormous overstocking and the bad general situation of business, deliveries of goods are being postponed from month to month, and buyers are in some cases six months and longer behind in the taking-up of their goods. The big losses which the trade had to stand through the unfavourable business and the downward movement of cotton prices were so discouraging to buyers that new orders are on a very small scale and are only hand-to-mouth purchases. On the other hand the manufacturers, in the endeavour to avoid as much as possible a reduction in their working time, have competed with each other in such a reckless way that prices have dropped far below production costs.

**HOLLAND.**

Although the demand for cotton yarns has somewhat improved during the last few weeks, most spinners find it very difficult to sell their production, while prices on the whole are unremunerative.

The demand for cotton goods, both for home trade and export, is far from brisk. Many buyers have no confidence in the present prices of cotton and delay their purchases as much as possible. Most manufacturers manage to keep their looms employed, but many of them complain very much about the low prices they have to accept.

**ITALY.**

The condition of the cotton industry in Italy is, generally speaking, bad. Cotton mills are only kept active owing to the pressure of the Government not to increase unemployment.

In the spinning section the average working time is 92 per cent., but the trade is working on an unremunerative basis.

In the weaving section matters are slightly better owing to lower yarn prices prevailing.

Printers are better and the export trade is being well maintained, although at a loss.

**NORWAY.**

The cotton industry in Norway is working under rather abnormal conditions. This is essentially due to two important factors. The rise of the Norwegian "krone" to par has not been followed by a corresponding reduction in the cost of production. Especially is the cost of labour too high; in fact it is the highest in Europe. To this comes the other calamity, dumping competition from other countries which have much lower costs of production, the Norwegian import duties not being sufficiently high to prevent this. The demand for cotton goods has during the past half-year been very unsatisfactory.

The Norwegian cotton industry is studying this matter very thoroughly and is trying to find measures by which these difficulties can be eliminated.

**PORTUGAL.**

The position of affairs in Portugal remains about the same as on the occasion of the last report. Approximately the working time is 75 per cent. of normal.

**SWEDEN.**

The condition of the Swedish cotton trade cannot be called good at the present time. Rather the contrary. The margin between yarn and cotton has gradually diminished and scarcely leaves any profit to the spinner.

The cloth market is also very dull. As the main part of the Swedish cotton cloth production is being sold in that country, the attitude of the cloth merchants is dictated by circumstances in the interior. Just now certain threatening great labour disputes are putting a brake on the trade's activity.

**SWITZERLAND.**

In Switzerland the position in the American spinning section is, generally speaking, rather bad. This is due in large measure to there being plenty of offers of yarn at cheap prices from Italy and especially from Austria.

In the American weaving section the position of the home trade is fairly good, owing to cheap yarn prices, and the consumption in cotton goods is normal. So far as export trade is concerned, the fear is expressed that manufacturers will have to curtail sooner or later.

In the Egyptian section spinning and weaving have during the past four or five months been bad. Goods cannot be sold at present but the hope is entertained, owing to the price of the Upper Egyptian and Pillion cotton having fallen, that better times are in store.

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After the termination of the Meetings most of the members of the Committee availed themselves of the kind invitations to pay visits to the mill of the Katoenspinnery Bamshoeve, Enschede, and Messrs. H. P. Gelderman & Zonen's mill at Oldenzaal. At Messrs. Gelderman's offices the members were entertained to tea and the President, Mr. F. Holroyd, thanked both Messrs. Gelderman and Blydenstein for their kindness in giving the members an opportunity of inspecting their mills.

A cordial vote of thanks was again accorded to Mr. Joan Gelderman and to the Dutch Association for the excellent arrangements which they had made during the stay of the visitors.



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# Report on the 1928 Journey Through U.S.A.\*

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By ARNO S. PEARSE,

*General Secretary, International Federation of Master Cotton  
Spinners' and Manufacturers' Associations, Manchester.*

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## SYNOPSIS

In submitting the following report (which had previously been circulated) to the International Cotton Committee at its meeting in Amsterdam, on October 22, 1928, Mr. Pearse said in part:—

The methods described are not intended to be applicable in each country; it depends on the wages, the number of available work-people, and restrictions as to working hours, etc., in each country; the methods may be more applicable to certain individual mills than to an industry as a whole in any one country. Automatic machinery of a costly nature only fulfils its purpose when a country is not hampered by trade unions which insist upon an equal or similar wage basis for the automatic machinery as for the ordinary, or restrict the number of machines per operative. The American mill owner does not sweat his operative, but he often sweats his machinery by working it day and night. He has recognized that the installation of automatic machinery, etc., does not pay if one is tied down to 48 hours per week without a second shift, and the factory legislation in the various States allows this extra shift. I was assured everywhere that the American mill operative under the mass-production system is *not* harder worked than in Europe. It was made very clear to me that conditions in U.S.A., and in some other countries, are such that those countries which are bound to abide by such restrictions must in due time lose their bread-and-butter trade and limit themselves to the making of specialities and fine goods which the United States and other countries are not likely to be able to make in large quantities for some time to come. That is the essence of the experience gained both by Mr. Helm and myself during our mill visits in U.S.A.

You cannot cause trade unions and their accompanying restrictions to be established in the Southern States, nor in other countries; therefore it would seem that the only way out of the difficulty is to educate the European trade unions to the standard of the American unions. If you do not succeed in that it may mean losing the staple trade of the cotton industry. The grafting of the mass-production system, as carried out in U.S.A., on to the cotton industry is forcing the question of trade union reorganization to the fore. Mass production means higher wages for the worker, but a reduction of the number of workers; it further means a lowering of the cost of the article produced, and consequently a higher consumption.

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\* The International Committee, at its meeting in Amsterdam, on October 22, 1928, decided to have this report printed in the INTERNATIONAL COTTON BULLETIN, but the Committee wish to point out that the report does not represent the official views of the International Committee.

The reasonable attitude of the American trade unions is clearly shown in the agreement which I have given verbatim, and in the extracts from an Australian trade unionist, who describes the conditions existing in America.

Mass production in the cotton industry in the United States, and in Japan, is only in its infancy. Other mills besides those mentioned have already introduced it, and many others are at the present time remodelling their organizations. The ring spinning machine and the automatic loom are the outstanding machines in the mass-production system of the cotton industry. It is no more a question of the skill of the operative, but of his quickness of movement. Mass production has been introduced in all the industries that are at present remunerative, viz.: motor, chemicals, shoes, clocks, meat packing, etc. No other industry seems to pay, except certain specialities. The manufacture of staple goods, unless produced on big lines by labour specialization, appears to be an unsound investment, at least in recent years.

I have mentioned in this report two automatic looms, the Draper Northrop and the Stafford loom; but, of course, there are many others in the world's markets, such as the Crompton-Knowles automatic box looms in U.S.A., the Rütli loom in Switzerland, the Whittaker attachment and the British Northrop loom in England. The Whittaker attachment is coming to the fore; it converts an ordinary loom into an automatic one, and is considerably cheaper. Other attachments of a similar kind are made on the Continent. I have mentioned the Draper and the Stafford looms merely because I have seen them so much in evidence in America. The other looms may be as good, or even better; but that is for each individual to find out.

The *specialization of labour* necessary in introducing mass production is the outcome of very careful studies of the working conditions in all the departments of the mill. For this purpose the more advanced mills have employed what they call a "time engineer" or "study man," a man who watches every movement of each operative, and in this way finds out the unnecessary movements which the operative has accustomed himself to make; he finds out who are the most efficient operatives and reorganizes the distribution of labour by confining the work of the spinning and weaving to those who show the greatest alertness at their jobs, the underlying principle being, of course, that each person must do only one kind of work: the spinner spins, the weaver weaves, etc. The work of lesser importance, such as oiling, sweeping, cleaning, is delegated to the less skilled, and we see that through such a redistribution of labour quite a large number of operatives have become superfluous. I cite the case of one company, which before the reorganization employed 3,200 men, whilst now they have only 2,500, although the machinery had been slightly increased during that interval; the kinds of cloth made by this mill are the same as before. The saving to this mill in wages alone amounts to one million dollars every year. Such examples can be cited by the dozen. If you refer to the Appendix, Mill No. 8, you will find that in one weaving shed of 430 looms 10 weavers are at work, and a number of other operatives are assisting, but their wages are not as high as those of the weavers. In this way a considerable saving

has been brought about, but that is only the beginning, as it is only nine months ago that the "time expert" made his report in this mill.

This specialization of labour has been carried out not only in the weaving but also in the ring spinning department where one ring tenter will attend to 1,584 to 2,200 spindles (30's), but one case came to our notice where one operative looked after 2,400 spindles, and you must take into consideration that the ring frames in America are comparatively small, having a small number of spindles, due to the fact that the ring diameter is considerably larger than in Europe, namely,  $1\frac{1}{2}$  ins. to 2 ins. with  $6\frac{1}{2}$  ins. to 7 ins. traverse, and that the tenter has therefore to walk a longer distance than in Europe.

It is the big bobbins which save a considerable amount of labour in doffing and winding. I invite you to study the number of hands employed for this work, as specified in the appendix. I am told that these large bobbins save about 20 per cent. of the labour cost in winding. On the Leesona Universal Winding system the cost for warping and winding works out to 0.803 cents, i.e. less than  $\frac{1}{2}$  d. per lb., a figure which seems incredible, but this was supplied by a manufacturer of very high standing who made careful costing calculations of all his processes and he assured me that it was perfectly correct; other people confirmed this cost to be about the same.

Some rewinding of *welt* takes place, but in most of the mills producing large quantities of the same kind of cloth they were spinning directly on the pun.

Theoretically specialization methods should be particularly remunerative in the making of fine goods, where labour costs are high in relation to other costs, but here quality is of paramount importance, and first-class quality and mass production are apparently not yet achieved everywhere, but the difference is only slight. That difference is not as evident in the bread-and-butter cloths, and what is being produced on automatic looms seems to satisfy the requirements of the large consuming markets, such as China and India.

I was very much impressed with the system of the *technical experts* who are being sent to the mills on the same basis as in some countries the chartered accountants investigate the book-keeping and general business management. The particulars which I obtained from one of these firms show that they had two sets of textile experts, consisting of: one gang head, looking after the general management and the purchase of cotton; one carder; one spinner, who is also a winding and warping expert; one weaver, who is also a slashing expert; and one organization man. Their duties are:—

- (1) To inspect all machinery, report on condition and advise repairs and renewals.
- (2) To test all speeds, settings, twists and drafts, and recommend adjustments according to the adaptability of the raw cotton.
- (3) Give standards on all machines for best production, least breakages, oiling and cleaning.
- (4) Test all machinery for stoppages, and trace the cause.
- (5) Labour distribution.

As a result of such recommendations various mills have been able to reduce loom stoppages from 1.5 per loom per hour to 0.5 per loom per hour. Up to date the above firm has surveyed 21 mills, of which only four were solicited; the remaining 17 were solely on recommendations of other firms, which is, I think, testimony to the usefulness of the work.

The manager cited an instance of one mill he surveyed, containing 150,000 ring spindles and 3,000 automatic looms, weaving a 60 x 54 print cloth, where the adoption of his recommendations resulted in a saving estimated at £88,000 per annum. To my mind, this figure seems incredible, and is probably to be taken with 30 per cent. dilution. The minimum saving he has been able to show in any mill has been about £10,000 per annum. His fee is about £400 per week for the average mill, and the period of survey is about four weeks. In many cases he found that they were using too good a quality of cotton, and advised the use of a shorter-stapled cotton, which proved satisfactory. In almost all cases he advised larger bobbins, with consequent saving in doffing and winding. The general opinion amongst mill managers whom I met is that this firm is doing some very good work.

We have the evidence of the cotton manufacturers who, after the advice of these specialists, increased the number of looms from 10 to 28, 72-in. to 108-in. reed space looms, and from 24 to 50 for the 40-in. reed space looms, and who only pay 10 per cent. increase in wages; this is evidently the standard increase in all mills which have adopted this multiple system.

On the occasion of my former mill visits in 1920 I was impressed with the large amount of seconds which the American mills produced, but this has changed. In my companion's opinion, Mr. Helm, who is a practical mill manager, there is no doubt that America is producing some very good fabrics on the automatic looms. Their seconds may be, perhaps, half or one per cent. more than ours. Mr. Helm is convinced, after his visit, that a wide range of high-class fancies can be produced on automatic looms.

I need hardly elaborate what I have written in the Report about *psychology in the cotton mills*; the spoken word is harsh, printed notices are better. The pick counter in the centre of the loom acts as an incentive to work. The team spirit is fostered, and greater responsibility is given to the foremen than in Europe. The bonus system is largely used.

The Americans have devoted very considerable time and study to *Mill Costings*. The Textile Institute has a department with several experts on the subject, and I have given an extract of their latest report.

## NEW USES OF COTTON.

The application of mass production on a large scale requires corresponding extension of the uses of cotton, and as costs of production are reduced this should not be an impossible task. I would impress upon you, first and foremost, the renaissance of cotton, about which I have written extensively in the report. I feel that our organization could do a great deal in bringing about that cotton dress goods become fashionable for the next few years, and I would suggest that each country takes up this question of advertising cotton dress goods by writing suitable articles in the press, and

particularly through mannequin parades in the stores of the big cities. Remember how artificial silk has been advertised by exhibitions in grandiose styles (Cologne, etc.), and all that time the cotton industry has done nothing to counteract that rayon movement.

Amongst other items mentioned in the "New Uses of Cotton" chapter I would like to stress what has been done in America as regards *Sheetings*.

The very novel way of *Road Signs* made from cotton is demonstrated. Miles of road signs are being employed. This is going to be a big development, consuming large quantities of cotton.

### RAW COTTON.

#### OUR CROP-REPORTING SYSTEM.

First of all, I wish to say that it has been a great relief to me to see that the system which was adopted by us in previous years for ascertaining the forecast of the Government Bureau Report has worked extremely well this year also.

The very spotted condition of the crop made estimates this year very difficult, and caused differences of one and a half million bales in the estimates of various firms.

The *weevil* has evidently done as much damage this year as last, when it was assessed at 18½ per cent., but the weevil conditions at the beginning of the season certainly pointed to a much greater possible damage. About ten days of hot weather in July–August helped to reduce the number of insects throughout the Belt materially, and when another young brood came to life the bolls had advanced so far that they could not pierce them easily. The boll-weevils are, however, so widely spread that there is little chance of a top crop anywhere, except in a few places. If the autumn is open and a *wet* freeze comes late, then we may get another quarter-million bales, but at this time a sharp freeze in North-West Texas may reduce the crop by a few hundred thousand bales. A dry frost does not harm the plants; it defoliates them, and that may prove an advantage at this time of the year. In N.W. Texas the plants have grown twice their usual size owing to exceptional moisture, so that it will not be easy to use sleds as extensively as is the custom in those parts.

The cost of dusting is being reduced by the use of aeroplanes, which are run by commercial companies. The International Harvester Company have introduced a new large duster, which dusts 16 rows at a time and is supposed to be cheaper than dusting by aeroplane.

The *Pink Boll-worm* attacked last year a portion of the South-West of Texas and the Government instituted quarantine zones in which no cotton was to be grown and indemnified the farmers affected. Evidently this plan has not worked to the entire satisfaction of the officials, for the chief entomologist spent during the time of my visit several weeks in Old Mexico with a view to getting the Government of that country to take combined action with the United States in order to reduce, if not exterminate, this very dangerous insect.

These are the salient points from my report which suggest themselves to me for special observation; the report itself requires a lengthy study.

## REPORT.

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AT the Paris meeting of the International Committee, on March 31, 1928, it was unanimously decided that the undersigned should undertake his fifth annual journey for the purpose of reporting the views held by leading men on the prospects of the cotton crop in U.S.A., and gathering information on any development affecting the cotton industry.

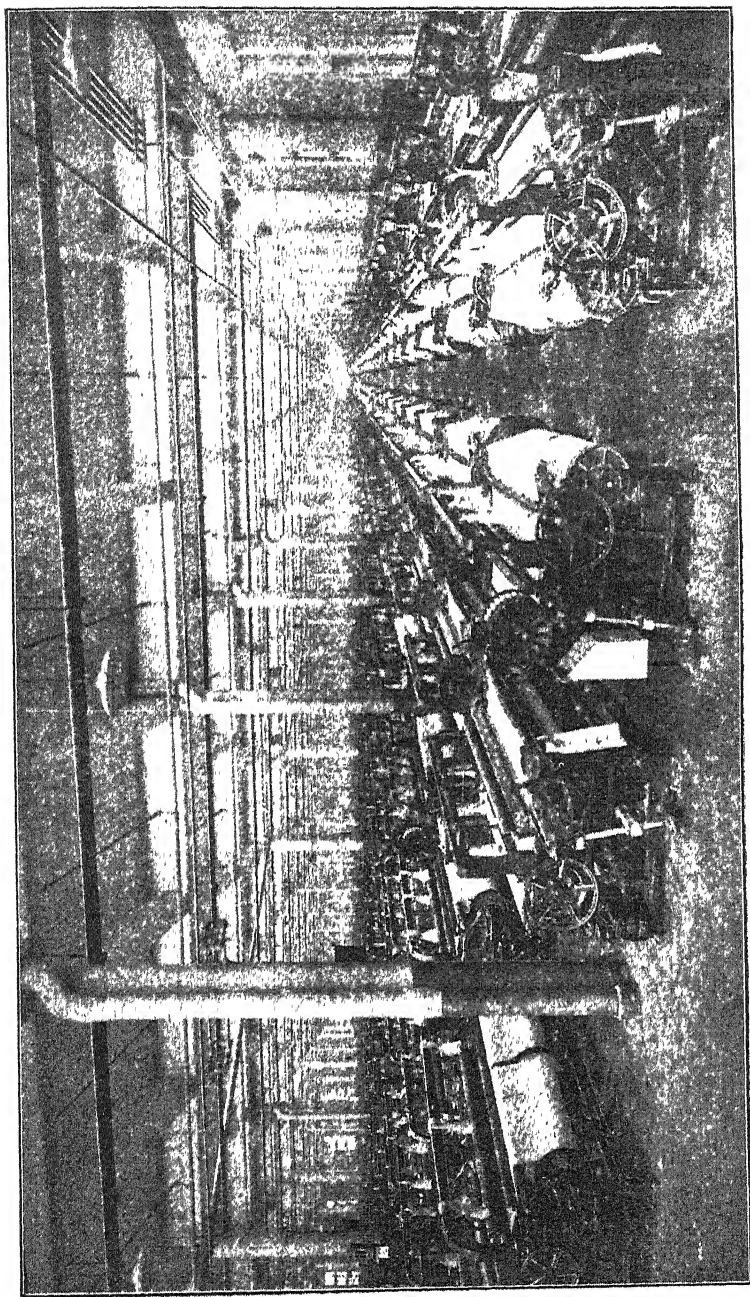
On arrival in America, towards the end of July, I found that in view of the lateness of the crop, I could spend the first three weeks more advantageously by visiting a number of cotton mills both North-East and South, for I was informed that since my last tour of inspection in 1920 many changes had taken place. The result of my mill visits is presented in the rather voluminous chapter "U.S. Cotton Mill Industry," and in the detailed notes in the appendix.

I stayed nine weeks in the States, and in that space of time one cannot help but discuss almost all the cotton problems, particularly as the American business mind is alert, and its owners generally make a hobby of their work. I am perfectly aware that not every one of our 5,000 members will be interested in *all* the subjects I mention in this report, but I must take into consideration that in so large a number some matter which seems of little importance to one may be considered very essential by the other.

I wish to thank most sincerely my many friends in U.S.A., who have not only shown me their mills, but have also provided me with information in a very generous manner. I believe in no other country of the world would I have been given such free access to inside mill information. The Americans have little competition to fear, and it is probably for that reason that they supplied willingly all the information that I am able to submit in this report.

The first section of my report will deal with the American Cotton Mill Industry, whilst in the second I shall refer to all matters relating to the raw material, such as crop conditions, Government forecasts, standards for length of staple, co-operative farmers' associations, machine methods of harvesting, etc.

This official report is merely an elaboration of the preliminary reports which I addressed at frequent intervals from America to



A weaving shed with 4,047 automatic looms (Draper-Northrop) making sheetings. Floor space of this shed is  $9\frac{1}{2}$  acres.

the members of the International Committee and to the affiliated organizations.

Before entering on a description of my personal mill experiences it appears to me necessary, in order that the reader should comprehend the full import of the matter dealt with, that he should become acquainted with the general conditions of the American cotton industry.

## U.S. COTTON MILL INDUSTRY

### SPINDLES.

According to a recent publication of the Bureau of Census, there are at present in U.S.A. 36,340,000 cotton spindles, of which, owing to the strike in New Bedford and general unfavourable business situation, a few million are idle, but due to the extensive use of night shifts and longer hours than in Europe, it is difficult to say what Lancashire equivalent in a 48-hour running week these 36,340,000 spindles represent. It can well be argued that they represent an equivalent of 50,000,000 spindles, running 48 hours per week. Practically all these spindles are ring spindles; in 1919, when the last census of the cotton machinery was undertaken, there were in U.S.A. only 3,140,250 mule spindles, and this figure has been considerably reduced since then. All the ring spindles have about one-third higher production than the European mule spindles. Mule spindles in U.S.A. have been reduced as follows: --

1904	1909	1914	1919	1928
5,221,857	4,716,794	3,692,495	3,140,250	1,774,800

Besides the cotton-consuming spindles, U.S.A. had in 1919 2,893,072 doubling and twisting spindles, but Davison's Textile Blue Book for 1928 estimates that there are only 2,077,780 of these spindles in existence at present.

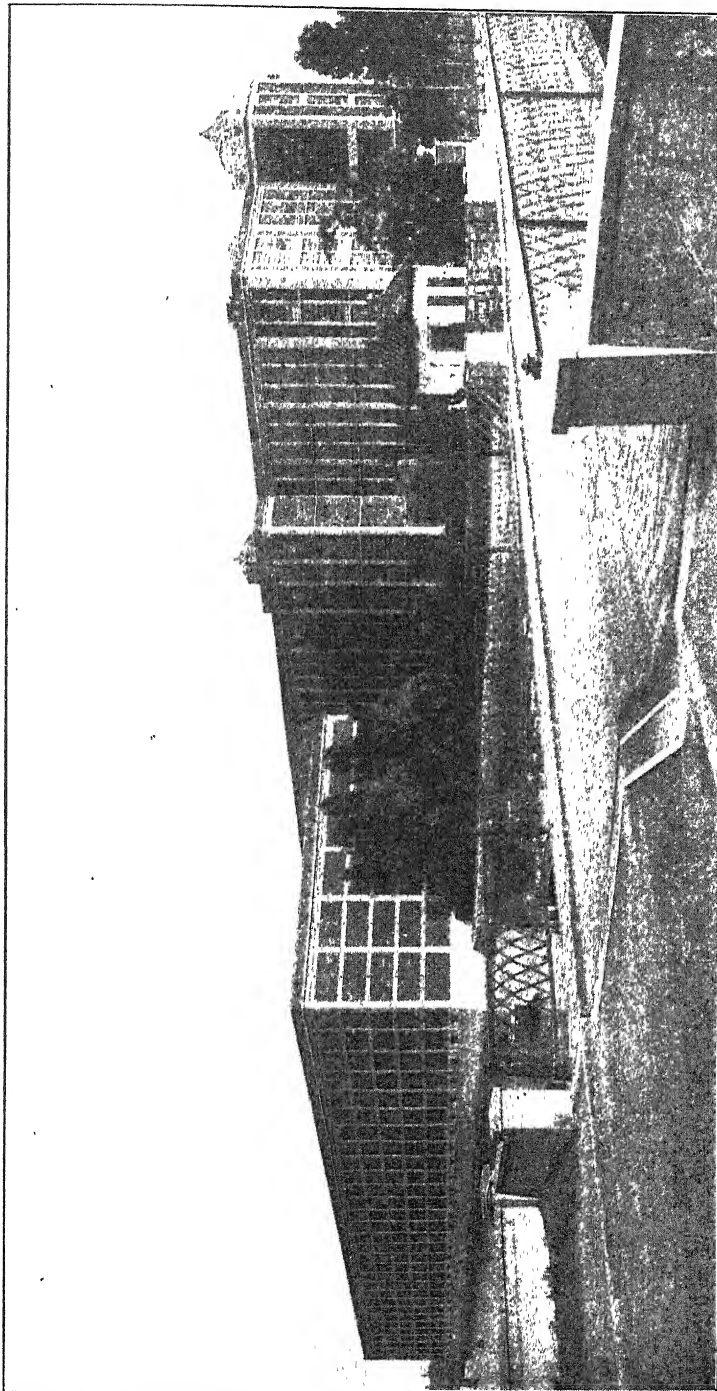
The South, which has developed its cotton industry in comparatively recent years, had in 1904 7,404,005 spindles, whilst to-day it has in the neighbourhood of 18,000,000, and has outstripped New England. More spindles are working day and night in the South than in the North.

### LOOMS.

Government statistics as to the number of looms are 10 years old. In the census of 1919 we find 692,169, of which 583,550 were engaged on plain cloth and 108,188 on fancies; 326,469 were automatic looms weaving plain cloth and 28,407 automatic looms weaving fancies.

The number of looms to-day is given in Davison's Textile Blue Book as 741,916, of which some 350,000 only are situated in the old cotton industry section, i.e., North and North-East, whilst some 400,000 looms are in the South. The South, I was told, has at least 300,000 automatic looms.

The following table from Davison's Blue Book shows the present position of cotton-mill machinery in U.S.A.:--



A Modern Mill in New England. The building on the left is the Cotton Warehouse. The large building on the right is the Spinning Mill. The 9½ acre Weaving Shed stands behind the large building and no part of it is visible in the photograph.

States	Cards	Ring Spindles	Mule Spindles	Twister Spindles	Broad and Narrow Looms
Alabama .. ..	3,875	1,449,767	....	79,376	24,555
Ark. .. ..	98	37,800	....	4,416	365
Calif. .. ..	309	50,656	....	17,886	701
Conn. .. ..	1,802	678,360	232,688	53,368	23,623
Del. .. ..	....	....	....	....	20
Georgia .. ..	10,027	3,229,100	26,798	331,224	62,049
Illinois .. ..	80	38,176	....	120	860
Indiana .. ..	238	84,496	....	....	2,162
Iowa .. ..	4	....	....	....	..
Kentucky .. ..	396	86,664	....	5,248	1,194
La. .. ..	425	101,244	....	600	1,465
Maine .. ..	1,358	1,121,588	....	31,560	27,794
Md. .. ..	129	68,528	....	3,264	943
Mass. .. ..	11,999	8,393,156	915,476	360,082	196,983
Mich. .. ..	3	84	....	16	346
Miss. .. ..	519	178,560	....	3,000	5,037
Missouri .. ..	144	29,000	....	1,100	580
N. Hamp. .. ..	2,320	1,399,338	11,448	11,540	37,863
N. Jersey .. ..	356	244,084	167,000	21,920	3,655
N. York .. ..	808	639,556	3,272	27,708	11,475
N. Caro. .. ..	16,267	6,188,073	18,008	733,071	88,051
Ohio .. ..	269	12,360	....	5,784	352
Okla. .. ..	103	30,912	....	2,000	558
Penn. .. ..	471	146,876	5,000	35,093	16,085
Rhode Is. .. ..	3,921	1,980,308	330,832	92,562	51,280
S. Caro. .. ..	11,329	5,422,969	4,306	139,714	128,109
Tenn. .. ..	1,444	578,664	10,000	35,558	8,607
Texas .. ..	1,012	281,366	....	16,448	5,709
Vermont .. ..	195	135,048	10,200	....	3,355
Virginia .. ..	1,752	692,260	....	9,230	19,138
Wisc. .. ..	74	....	....	....	197
Total .. ..	17,727	33,298,993	1,735,028	2,021,888	723,411
Total Idle					
Machinery .. ..	1,903	850,368	39,772	55,892	15,355
Mills under					
Construction	....	107,500	....	....	3,150
	73,630	34,256,861	1,774,800	2,077,780	741,916

Machinery in mills to be completed by July 1st, 1928, is included in the regular figures.

In the cotton spinning and weaving industry there were employed on an average:—

1925	1923	1921	1919
468,352	495,197	425,817	446,852

In spite of the increased number of spindles and looms, we find a reduction in the number of hands employed. How is that possible? The answer is specialization of work and a general reorganization in the distribution of labour of the mill. Of this succeeding chapters will give proof.

How many of the looms are working day and night is difficult to estimate. I was told at the Cotton Textile Institute that night work was going out of favour, and there are rumours that some States in the South are going to legislate against it; but particularly in the South I found many mill men in favour of night work, and most of the mills which I visited were running at night. As all the mills have their villages to house the operatives for double shifts, it is not likely that we shall see soon the abolition of night work in

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the South. In one mill in the North I was informed that night work was more remunerative, and that the best operatives were employed in that shift. This mill was producing fine goods and was running short time during the day shift.

At a conservative estimate, one can say that in U.S.A., under normal conditions, 300,000 looms are running at night, and for the purpose of making comparisons we must allow also for the much longer day shift than in Lancashire and the European Continent.

Taking all these conditions into consideration, we find that the U.S.A. cotton industry has an equivalent capacity slightly less than Great Britain, which is tied down to 48 hours per week and to one single shift.

U.S.A., on a conservative basis, has an equivalent of  
 50,000,000 spinning spindles. The 1,000,000 equivalent looms  
 (for actual number is 723,411, plus addition for longer  
 day shift and night shift) at the usual 25 spindles per  
 loom represent  
 25,000,000 equivalent spindles.  
75,000,000 Total for U.S.A.

Great Britain has  
 57,101,000 spinning spindles, and the 750,000 looms at 25 spindles  
 represent  
 18,750,000 equivalent spindles.  
75,851,000 Total for Great Britain.

The cotton consumption of all kinds of cotton in Great Britain per 1,000 spindles is at present 3.76 bales, whilst in U.S.A. it is 46.49 bales. A great deal of this considerable difference is due to night work, longer day shifts, and, of course, a very important proportion must be allotted to the much coarser counts produced in U.S.A.

The 1919 census of production gives the following classification of counts, which by now has changed to some extent owing to the finer counts that are being spun in the South.

PRODUCTION OF COTTON YARN IN THE COTTON-GOODS INDUSTRY  
 FOR OWN CONSUMPTION AND FOR SALE COMBINED, BY SECTION  
 (POUNDS): 1919, 1914, AND 1909.

Section and State	Total			No. 20 and under, coarse		
	1919	1914	1909	1919	1914	1909
United States . . .	2,346,854,120	2,170,578,612	2,037,653,722	1,122,730,389	989,413,874	1,014,069,688
Cotton-growing states	1,351,397,315	1,179,546,431	1,030,979,405	795,029,410	627,433,199	632,941,012
New England states	869,631,690	859,644,258	865,837,522	251,660,637	272,571,621	290,135,400
All other states ..	125,825,085	131,387,923	140,786,795	76,040,342	89,409,054	90,993,276
Section and State	No. 21 to 40, Medium			No. 41 and over, fine		
	1919	1914	1909	1919	1914	1909
United States ..	1,062,731,573	1,026,306,852	866,328,605	161,392,158	154,857,886	157,255,429
Cotton-growing states	512,905,110	526,914,379	360,871,200	43,462,825	25,198,853	37,107,133
New England states ..	504,169,089	462,297,107	461,030,916	113,801,064	124,775,530	114,721,206
All other states ..	45,656,474	37,095,366	44,426,429	4,128,269	4,883,503	5,367,090

Whilst 10 years ago hardly any fine counts (above 60's) were produced in the south of U.S.A., conditions are changing, and 80's and 100's are getting quite an ordinary count. In one mill I saw 120's being spun on a ring frame, and 130's was being produced in Gastonia, N.C.

#### KINDS OF CLOTH PRODUCED.

What is all this machinery producing, and who are the customers? The last census of 1919 gives some information on the production.

#### SUMMARY OF PRODUCTS FOR THE COTTON-GOODS INDUSTRY, 1919

Product and State	lbs.	sq. yds.	Value (dollars)
Total value .. .. .	.. .. .	.. .. .	2,125,272,193
Woven goods (over 12 in. in width)	1,814,949,042	6,317,397,984	1,489,610,779
Sheetings .. .. .	330,303,642	1,368,946,386	220,089,704
Pillow tubing .. .. .	3,510,374	12,112,573	2,555,543
Print cloth .. .. .	167,986,446	997,485,012	122,558,328
Tobacco, cheese, butter, bunting, and bandage cloths .. .	22,350,184	239,866,071	16,976,323
Lawns, nansooks, cambrics, and similar muslins .. .. .	53,988,370	417,893,406	79,384,890
Mosquito netting and tarlatan ..	3,271,283	34,425,307	3,273,376
Ginghams .. .. .	77,396,286	368,307,601	85,070,745
Shirtings (not silk-striped) .. .	73,736,038	318,263,829	70,969,630
Shirtings (silk-striped) .. .. .	5,854,054	33,865,803	12,379,237
Pique (except shirtings) .. .. .	16,251,948	78,851,827	23,060,460
Drills .. .. .	117,627,118	314,822,109	73,253,640
Twills and sateens .. .. .	131,537,280	424,478,033	101,056,691
Ticks .. .. .	18,268,115	53,683,485	13,125,054
Denims .. .. .	87,088,323	166,697,695	56,955,603
Cotton flannel (canton flannel, flannelettes, and blanketings) ..	82,319,178	268,067,853	60,152,426
Cottonades .. .. .	6,234,880	13,934,761	4,615,925
Cotton worsteds .. .. .	2,637,269	7,197,280	3,861,549
Tire duck .. .. .	128,174,168	123,465,422	143,086,211
Ounce duck (except tire) .. .. .	122,027,248	178,539,527	70,601,255
Numbered duck (except tire) .. .	38,329,234	34,495,508	23,395,085
Tire fabric, other than duck .. .	29,916,856	36,805,932	32,601,941
Canvas (except bagging) .. .. .	11,867,754	11,784,013	7,497,732
Bags and bagging .. .. .	25,656,705	82,433,300	13,139,820
Bags (fabric woven in estab- lishments reporting) .. .. .	5,755,378	16,182,932	2,849,296
Bagging .. .. .	19,901,327	66,250,368	10,290,524
Tapestries .. .. .	9,625,430	21,705,586	17,295,608
Plushes, velvets, and velveteens, cut or uncut .. .. .	13,368,093	20,320,759	22,808,885
Pennsylvania .. .. .	6,172,296	6,463,830	11,575,008
All other states .. .. .	7,195,797	13,856,929	11,233,877
Corduroys .. .. .	12,807,454	19,863,021	13,864,666
Turkish towels and towelling ..	16,870,538	31,505,619	14,059,097
All other terry weaves .. .. .	573,682	442,443	418,546
Towels and towelling, wash cloths, bath mats, wiping and polishing cloths (except pile fabrics) .. .	20,753,779	43,217,453	16,752,727
Bedspreads and quilts (crochet, marseilles, and satin) .. .. .	12,700,004	24,071,651	10,244,732
Cotton table damask in the piece or otherwise .. .. .	10,543,966	27,499,294	9,544,478
Sheets and pillowcases .. .. .	5,018,648	20,816,607	3,368,769
Cotton blankets .. .. .	42,320,816	96,620,556	32,639,927
Cloths, filled or coated (window hollands, etc.) .. .. .	833,985	2,459,427	1,115,393

SUMMARY OF PRODUCTS—*continued*

Product and State	lbs.	sq. yds.	Value (dollars)
Cloth composed of cotton and silk or other vegetable fibre and silk (except silk-striped shirtings) .. .. .	6,692,135	51,404,771	18,587,057
Fabrics made entirely from cotton waste .. .. .	3,393,629	4,539,734	1,422,451
All other woven goods (over 12 inches in width) .. .. .	103,114,130	366,505,330	87,827,375

## STATE OF THE COTTON TRADE IN U.S.A.

The information which I was able to obtain on this subject may be summarized as follows:—

About 50 per cent. of the industry is losing a trifle, but not nearly as much as the American section of the Lancashire cotton industry; 25 per cent. are neither losing nor making a profit, the rest are working the mills with a profit. Just prior to the publication of the September Crop Report business began to take up; there were two large motor car companies in the market with considerable orders, but the uncertainty resulting from the report caused a temporary withdrawal of the demand. It must be borne in mind that Ford, last year at this time, was not using much cotton as he was employed with the technical preparation of his new car, but this year the works are in full swing and the motor business generally is looking up. It is now estimated that the automobile business is responsible for the consumption of one million bales per annum, partly for tyres, but also for inside furnishings and for the outside fabric bodies which have come into demand.

## COTTON GOODS EXPORTS FROM U.S.A.

We have always been in the belief that U.S.A. with her high wages cannot export cotton goods. The cotton manufacturers of Europe, and particularly Lancashire, may find this some day to have been a very mistaken idea. The specialization of labour as adopted in all the big American industries has been grafted on to the cotton industry, and has been a means of levelling U.S. wages to the proximity of European wages. Can Europe do the same, and bring her costs down to those of competing countries with lower wages? Of course, it means higher wages to the individual worker, but a lesser aggregate of wages outlay. That kind of organization has reduced the cost of production in U.S.A. very much, and will enable, particularly the South, to export cotton goods in increasing quantities. We saw packages of grey jeans, drills, marked for India, China, all South American Republics, Cuba, Philippines. In those markets the American goods meet the competition of the world, and they are bought simply because they are cheaper than ours. The average U.S.A. cotton manufacturer has never had any need to bother about the foreign trade, he has had a magnificent home trade, at his very door, ready to take all he could produce. But of late so many more spindles have been erected and what is more important, so many concerns have gone on two shifts, that there is undoubtedly too much production for it to be consumed entirely by the home market. The result is a gradual development of the export trade of manufactured cotton goods. American exporters

made grave mistakes during the war, but they have learnt and are learning, and there is no reason why America should not be able to develop the cotton goods export trade; in fact she may be forced into it. The cotton mills generally have their own selling organizations in the shape of separate firms, and some of these have at the present time their agents investigating foreign markets. The United States Consular Service—with specialized textile experts—stands head and shoulders above that of any other European country.

In the statistical section, at the end of this volume the figures of exports, the countries of destination and the character of the goods are given, from which one must learn that the old mistaken idea of the inability of the U.S.A. cotton industry to compete should be definitely set aside and forgotten. It is true, in fine goods and fancies, we may have less to fear, and shall continue to send goods to U.S.A.; but in the goods which have all along constituted the staple exports of Lancashire and other countries, America will compete, unless these countries are able to follow on the lines of mass production.

This is not a popular cry, but that lesson will be most definitely impressed on anyone, especially if one visualizes the changes that have been taking place since 1920. The one great saving clause is that even the South, since the introduction of industry, has become protectionist; if U.S.A. were to abolish protection and consequently reduce cost of living and wages, no other country would be able to stand up against U.S.A. as an exporter. As it is, some cotton goods are being exported near the cost of production and the home market often makes up for this loss, i.e., dumping is carried on, in order to get a footing in certain markets with some goods.

The total exports of cotton goods in 1913 were 444,720,241 square yards, of a value of \$30,668,234, whilst in 1927 the square yards exported were 564,883,865, and the value \$76,738,437.

To these items ought to be added the not inconsiderable amounts of cotton cloth which the foreigners receive along with the motor cars, for the tyres and inside coverings of saloons, even the outside fabric bodies, contain large quantities of cotton cloth.

For the list of countries to which U.S.A. has exported you are invited to refer to the table published in the Appendix. So far America's cotton goods exports have been of a spasmodic nature, but there is too much machinery, or, at all events, too much double shift, in U.S.A., and I fear that America will have to find more foreign markets for her customers. The extraordinary period of prosperity which U.S.A. has enjoyed ever since the outbreak of war, and which has caused the people to spend more money than usual on cotton, will not last for ever. America's cotton industry, unfettered by trade-union regulations or by severe factory legislation, and directed by far-seeing men will make big efforts in the near future to sell the surplus of her production abroad.

The very fact that the following important increases have taken place during 14 years in the exports of cotton goods from America confirms that the United States are able to compete with Europe in some cotton goods. The example of exports to England and to British South Africa are particularly striking:—

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## EXPORTS OF COTTON CLOTH.

	1913		1927	
	Sq. yds.	Value \$	Sq. yds.	Value \$
United Kingdom (England) .. ..	2,468,976 ...	424,124 ..	7,698,980 ..	2,076,772
Canada .. ..	27,121,528 ...	2,507,341 ...	62,984,026 ..	8,512,279
British South Africa ..	251,572 ...	39,856 ...	15,113,366 ..	2,602,999
Egypt .. ..	637,482 ..	43,643 ...	1,156,814 ..	192,161
Greece .. ..	186,713 ...	15,498 ...	3,628,279 ..	443,885
Sweden .. ..	20,491 ...	9,260 ..	437,082 ..	103,439
Norway .. ..	90,710 ...	13,397 ..	2,426,319 ..	431,626
Netherlands .. ..	9,473 ...	2,605 ..	719,447 ...	191,094

## COTTON GOODS IMPORTS INTO U.S.A.

The volume of imports continues to shrink. Measured in square yards, it was as follows:—

1919	1920	1921	1922
47,846,024	124,446,600	112,340,259	148,343,040
1923	1924	1925	1926
206,146,780	183,749,869	110,464,954	61,000,823

These figures indicate, in the language of the Tariff and Taxation Committee of the National Association of Cotton Manufacturers, "a fairly satisfactory operation of the tariff under present conditions."

Great Britain supplies 67 per cent. of the total imports, as compared with 76 per cent. in 1926 and 86 per cent. in 1924-25.

Switzerland's imports into U.S.A. have risen from 2,074,157 square yards in 1924-25 to 7,850,998 in 1926-27.

The list of countries from which U.S.A. buy is:—

	1924-25	1925-26	1926-27
	sq. yds.	sq. yds.	sq. yds.
United Kingdom .. ..	138,376,484	56,311,757	38,255,326
Japan and Korea .. ..	8,828,717	2,578,994	1,871,618
Czecho-Slovakia .. ..	3,627,187	4,528,362	3,759,794
Switzerland .. ..	2,074,157	4,792,079	7,850,998
France .. ..	3,092,929	2,220,779	2,276,064
Germany .. ..	1,198,814	2,206,014	1,524,757
Netherlands .. ..	544,584	534,689	72,248
Belgium .. ..	677,346	337,913	259,089
Austria .. ..	130,563	32,899	16,805
Italy .. ..	53,476	78,903	122,847
Canada .. ..	12,261	32,595	21,308
Hong Kong .. ..	35,949	5,712	8,617
Cuba .. ..	—	30,767	—
British India .. ..	512	24,000	14,309
Poland and Danzig .. ..	15,048	1,189	—
China .. ..	5,046	2,161	6,026
Spain .. ..	1,347	5,402	34,746
Australia .. ..	2,928	—	—
Finland .. ..	—	3,333	—
Turkey .. ..	2,822	121	381
Azores .. ..	—	2,085	2,324
Guatemala .. ..	—	1,280	—
Sweden .. ..	—	1,116	145
Philippine Islands .. ..	270	—	—
Denmark .. ..	116	152	607
British Guiana .. ..	233	—	17
Irish Free State .. ..	371,068	—	1,028
Total .. ..	159,051,855	73,732,716	56,099,054
Decrease .. ..	—	85,319,169	17,633,662

These figures are very significant and show that U.S.A. are

Below are statistics relating to the kinds of cloth imported at the principal ports of the United States, which account for about 80 per cent. of the importations. The importations of poplins and broadcloths have decreased in the three fiscal years from 96,000,000 square yards to 17,000,000 square yards. On the other hand, the group of lawns, organdies, nainsooks, cambrics and similar fine goods of average yarn number, 40's and above, show increased importations from 11,449,785 square yards to 16,529,737 square yards. There are also increases in the groups of "dotted swisses" and "jacquard woven cloths"; in one case of 50 per cent., and in the other of 100 per cent., as compared with the fiscal year 1924-1925.

## IMPORTED

	June 30th 1924-25 sq. yds.	1925-26 sq. yds.	1926-27 sq. yds.
(1) Broadcloths, poplins ..	95,982,131	33,711,097	16,967,885
(2) Sateens (7 harness or less)	13,858,280	4,390,824	4,630,918
(3) Sateens (8 harness or more)	3,938,507	2,190,327	2,541,393
(4) Lawns, organdies, nainsooks, cambrics and similar fine goods of average yarn num- ber 40's and above ..	11,449,785	13,762,446	16,529,737
(5) Voiles plain and fancy ..	5,426,275	5,863,405	2,243,107
(6) Crepes .. ..	5,607,316	1,702,528	1,021,878
(7) Gingham two of more colours averaging 20's to 50's yarn number ..	1,318,185	814,232	365,078
(8) Ratines .. ..	377,651	153,623	121,016
(9) Dotted Swisses .. ..	278,727	201,601	324,262
(10) Jacquard woven cloths ..	641,518	903,705	1,346,042
	<u>138,878,375</u>	<u>63,693,788</u>	<u>46,091,316</u>

CONCLUSIONS AFTER VISIT TO AMERICAN  
COTTON MILLS.

The following are the conclusions at which the writer has arrived, but those of the readers who desire to have more detailed information are referred to the notes on the individual mills, which will be found in the Appendix.

In my visits to the mills I was accompanied by Mr. F. Helm, manager of the cotton spinning and weaving mills belonging to the Calico Printers' Association Ltd., Manchester, England, and in the course of our journey we exchanged a good deal of our opinions and impressions. Part of the conclusions arrived at and printed in the next few pages is the outcome of our interesting talks, and I hereby acknowledge my thanks for the assistance which Mr. Helm has rendered to me.

In general it may be stated that Europe has little to learn from U.S.A. as regards spinning; but, as regards weaving, we are convinced that the organization, particularly the specialization of work, enabling a worker to look after many more machines than in Europe, is a great advantage and well worth the consideration of *all* cotton manufacturers.

The following are the headings under which we have specified the outstanding differences between European and American mills:

#### SPINNING.

(1) Automatic feed from bale opener to hopper-feed opener. Generally Saco Lowell's machines were used, and we were told that they gave the utmost satisfaction, causing considerable economy in labour.

(2) Large card cans, 12 ins. diameter.

(3) Drawing frames. Two heads of drawings were universal.

(4) Very large slubber bobbins, 12 ins. lift  $\times$  6 ins. diameter.

(5) Intermediates. Large bobbins about 10 ins.  $\times$  5 ins. diameter.

(6) All slubbers and intermediates were looked after by male operatives.

(7) Blowing room and card rooms were laid out almost regardless of space. Very ample room allowed.

(8) *Spinning Room.* The frames are very short, probably on an average, 112 spindles a side.

The outstanding feature was the almost universal use of a  $6\frac{1}{2}$  ins. or 7 ins. lift, large ring diameter, say 2 ins. for twist and  $1\frac{1}{2}$  ins. weft.

The specialization of tenters, looking after as many as 2,400 spindles, but performing no other work.

(9) *Winding.* High-speed winding is universal, the "Leesona" system predominates, some have Barber-Colman. (The use of large bobbins in the spinning is said to reduce the cost of winding by about 20 per cent.).

(10) *Warping.* In the New England States high-speed warping mills are more common than in the South.

(11) *Slashing.* On the slashing boxes are instruments to control steam and temperature. In one southern mill we saw artificial silk warps being sized on a one-cylinder machine.

#### WEAVING.

Almost all the looms used are automatic.

The "Stafford" shuttle changing loom has its great value in weaving fine goods. (See further reference to this loom in the detailed reports on the mill visits in the Appendix.)

The "Draper" looms (Northrop) outnumber by far any other make, particularly in the South they seem to be practically the only looms used. (In the South are at least 300,000.)

The weft fork of the "Draper" loom stops the loom when weft is broken, and does not, as was the case with the old automatic looms, simply cause a change of the weft pirn. The "Draper"

looms in U.S.A. have this weft fork stop, and consequently they produce a perfect pick-found cloth. The midget feeler reduces waste on the pirn and the "Stafford" cutter on the "Draper" loom cuts off the weft near the shuttle-eye and prevents whipping-in of the weft. The new warp-stop motion is excellent, as it indicates at once where the thread is down.

The following list shows the kinds of cloths which we have seen being woven, or of which we were able to obtain particulars.

*Summary of the different classes of goods woven on "Draper's" Northrop looms, together with particulars of number of looms, wages, etc. All these particulars refer to the South of U.S.A.*

*Printers.* 39 ins., 80 × 80, 30's warp, 43's weft, 4-00 yards to the pound, 44 looms per weaver; 60 to 100 looms per battery hand, pay weaver 1 cent per lb.; weavers average \$21.00 per week; pay battery hands 2½ cents per battery. Tacklers run 72 to 100 looms; earn \$21.00 per week.

43 ins. 44 × 40, 33's warp, 43's weft, 6-80 yards to the pound, with feelers, 30 to 40 looms per weaver, 60 to 100 looms per battery hand. Pay weaver 1½ cents per lb. Pay battery hands 2½ cents per battery.

39 ins. 4-00 yards to the pound, 80 × 80, 29's warp, 39's weft, 44 looms per weaver, 100 looms per tackler, 60 to 74 looms per battery hand.

39 ins. 4-75 yards good, 68 × 72, 30's warp and 40's weft, weavers run 55 looms; battery hands 68 looms. Weavers earn \$21.00 per week for 100 per cent. production, which is obtained by through noon hour. Pay battery hands 3½ cents per battery daytime, and 4 cents per battery at night.

*Sheetings.* 90 ins., 60 × 60, 30's warp, 30's weft, weavers run 16 looms and fill batteries. Pay weavers 36 cents per 100,000 picks; average \$21.00 per week. Loom tacklers take care of 34 looms and are paid 34 cents per hour; tacklers average \$18.90 per week.

48 ins., 56 × 52, 30's warp, 40's weft, weavers run 22 looms and fill batteries. Pay weavers 17 cents per 100,000 picks; weavers average \$19.00 per week. Tacklers run 84 looms and are paid 34 cents per hour; tacklers average \$18.90 per week.

40 ins., 56 × 44, 30's warp, 40's weft, weavers run 26 looms and fill batteries. Pay weavers 12 cents per 100,000 picks; weavers average \$19.00 per week. Tacklers run 84 looms and are paid 34 cents; tacklers average \$18.90 per week.

40 ins., 60 × 56, 22's warp, 22's weft, 3-60 yards per lb. Weavers run 26 looms and fill batteries; average \$19.00 per week. Tacklers take care of 86 looms and average \$18.90 per week.

36 ins., 48 × 40, 22's warp, 25's weft, 5-50 yards per lb. Weavers run 32 looms and fill batteries. Tacklers take care of 100 looms. Weavers are paid 9½ cents per cut of 62 yards. Tacklers are paid 41 cents per hour in daytime and 42 cents at night.

21's warp, 25's weft. Weavers on 72-in. looms run 43 looms with battery hands. Weavers on 82-in. looms run 38 looms with battery hands. Weavers on 90-in. looms run 28 looms with battery hands. Weavers on 100-in. looms run 24 looms with battery hands. Battery hands run 56 looms.

*Broadcloth.* 37 ins., 4-10 yards per lb., 100 × 60, 30's warp, 43's weft; 24 looms per weaver, 27 looms per tackler, 72 looms per battery hand.

37 ins., 4-25 yards per lb., 128 × 68, 37's warp, 42's reverse twist weft; weavers run from 14 to 16 looms and fill batteries. Loom speed, 150 picks.

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includes a personal interpretation of the market by Theodore H. Price; a complete digest of and comments on the cotton news of the week; correspondence from the important spot markets; crop and weather news; quotations; statistics; reports on the goods markets; and personal news of the cotton trade. Its advertisers include most of the larger cotton shippers of the United States.

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*The Authoritative Weekly of Business*

16 EXCHANGE PLACE, NEW YORK, U.S.A.

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37 ins., 98 × 60, 30's warp, 40's weft; weavers run 32 looms; battery hands, 62 to 87 looms. On 90 per cent. production weavers get \$18.50 per week, but are averaging 93 per cent. production.

100 ins., 100 × 64, 36's warp, 21's weft, 1 28 yards; weavers run 22 looms with battery hands. Combed warp.

90 ins., 100 × 64, 36's warp, 21's weft, 1.43 yards; weavers run 26 looms with battery hands. Combed warp.

37½ ins., 90 × 60, 30's warp, 44's weft, 4.32 yards per lb.; weavers run 18 to 20 looms, and are paid 2.40 per 100 lbs. daytime and 2.60 per 100 lbs. night. Weavers average \$21.00 per week. Tacklers run 62 looms and are paid 36 cents per hour; average \$19.80 per week. 95 per cent. production.

37½ ins., 100 × 60, 30's warp, 44's weft, 4.10 yards per lb.; weavers run 16 to 18 looms, and are paid 2.60 per 100 lbs. daytime, 2.80 per 100 lbs. night. Weavers average \$22.00 per week. 94½ per cent. production.

38 ins., 100 × 60, 4.10 yards, 30's warp, 40's weft, woven on dobbies; weavers run 15 looms, and are paid 35½ cents per cut of 60 yards; average \$19.00 per week. Tacklers run 48 looms, and are paid 44 cents per hour. Production, 101 per cent. with extra time, 2½ per cent. seconds.

*Fine Goods.* 37 ins., 4.40 yards, 124 × 68, 80's/2 warp, 100's/2 weft; weavers run 12 looms and fill batteries. Expect to run 16 looms when get started up better.

37 ins., 144 × 76, 100's/2 warp, 100's/2 weft; weavers run 10 looms and fill batteries.

*Rayon Alpacas, White and Coloured Warps.* 34½ ins., 64 × 48, 50's warp, 150-dernier rayon weft, plain weave. Weavers run 18 and 20 looms and fill own batteries.

Fancy rayon alpacas, 34½ ins., 64 × 48, 50's warp, 150-dernier rayon filling, 20 to 25 harness work, 12 looms per weaver, and fill batteries; pay 42½ cents per cut of 60 yards day and 46½ cents night.

*Canton Silk.* 35 ins., 96 × 104, 60's warp, 1 end 22-26 Canton weft, plain weave; weavers run 18 looms and fill batteries; pay weavers 49½ cents per 60 yards cut daytime and 54 cents per 60 yards cut at night.

*Medical Gauze.* 36 ins., 28 × 24; weavers run 90 looms; battery hands, 90 looms; pay weavers 3.9 cents per 100,000 picks.

42½ ins., 44 × 40; weavers and battery hands run 72 looms; tacklers run 140 looms, but do not put in warps.

On similar goods to the above, at another mill, on 40-in. looms, weavers, tacklers and battery hands run 108 looms each.

*Pyjama Cloth.* 72 × 80, 30's warp, 40's weft; weavers run 26 looms and fill batteries. Tacklers take care of 106 looms, and are paid 38 cents per hour. Weavers average \$22.00 per week. Total labour cost, 10 cents per lb.; weaving cost 3½ cents per lb.

*Pyjama Cloth.* 36½ ins., 72 × 80, 30's warp, 40's weft; weavers run 40 looms, and are paid 16½ cents per cut of 60 yards. Battery hands take care of 80 looms, and are paid 42½ cents per cut of 60 yards. Loom speed, 155 picks per minute.

*Flat Duck.* 29 ins., 76 × 28, 9.75 warp, 6's weft, 8 ozs.; weavers run 20 looms with battery hand. Battery hand takes care of 24 looms and tacklers take care of 46 looms. Pay weavers 12.6 cents per cut of 55 yards; pay tacklers 35 cents per hour.

*Denim.* 28 ins., 66 × 44, 8.25 warp, 13's weft, 2.20 yards per lb., reed 21-20; weavers run 14 looms without battery hands. Pay weavers 24 cents per cut of 60 yards. Weavers average \$18.50 per week. Tacklers run 72 looms, with hand to lease out pattern and lay up full warp. Pay tacklers 38.2 cents per hour; average \$21.00 for 55 hours. Loom speed, 164 picks. On same construction have two weavers running 38 looms each, with helper to each 38 looms to fill batteries and take off cloth.

The use of the automatic loom has become so general and the other high-speed winding and warping machines have been so

perfected that any country which stands behind in their introduction is likely to find its trade diminishing. If it is not the competition from U.S.A. *at present*, it will be the competition from some other country which has followed the lead given by U.S.A. in automatic looms and in specialization of labour.

The U.S.A. cotton manufacturers can well afford frequent replacement by new and more producing machinery, as they are not hampered by a 48-hour week, nor are they tied down to work only one shift; furthermore, the workpeople, not even the few unions in New England, insist on the old wage basis when higher-producing machinery has been installed. In consequence of the freedom from such restrictions the overhead charges of the American mills are much reduced, and the wages, which at first sight appear high, work out to a low level per yard or pound.

Automatic looms, high-speed warping mills and high-speed winding frames which we find in general employment in America are very expensive machines, and where they can be worked only 48 hours per week it is doubtful whether their installation becomes remunerative. The question naturally arises: "Is it not likely that any country which prefers to keep to only one shift of 48 hours, or to the same wage basis for improved machinery as for old, or where unions restrict the number of machines per operative, is bound to lose all that part of its cotton trade which does not call for special skill in the manufacture; in other words, the staple trade which finds employment for the masses of the workpeople will be handed over to the industrially "free" countries. Such a development may take a few years, during which period more and more short time will characterize the industrially "fettered" countries.

The ring spinning machine is the mass-production machine in the spinning and has replaced the mule; the automatic loom is the mass-production machine in the weaving. It seems, in the manufacture of staple goods, just as useless trying to fight these two machines with the old ones, as it was for a hand spinner or weaver to compete with steam-driven machinery. The quality produced may be a little inferior, but it is evidently good enough for the purpose.

(12) *Cleaning.* A team of operatives in practically all mills is constantly engaged in washing the floors, a custom which I have not noticed in any other country.

Some cleaners go round sweeping up the fluff between the machines. All kinds of contrivances, mostly like a mud-scraper, are used for this purpose. One kind, which seemed very good, worked like a pair of scissors, thus enabling sweeping between narrow and broad alleys. In many mills the cleaners waft the fluff off the machines by palm-leaf fans or by compressed air; in one mill we saw a travelling funnel over the ring frames, blowing off the fluff, but all this scattering of fluff did not seem to be an advantage. In spite of all the continuous cleaning the impression we gained was that the cleanliness of American mill machinery is behind that of Lancashire and of several countries on the Continent.

(13) The architecture of the latest southern mills allows for plenty of space between the machines, side alleys and wide stair-

cases. It seemed strange that in the case of sheds the saw-toothed roof had been replaced by flat roofs, the centre of which was raised, but also flat.

(14) The fencing of machinery is nowhere as well carried out as in Lancashire. In the New England States it is better than in the South, but gradually the Southern State legislation imposes better fencing provisions.

(15) The cost of building a mill in the South, spinning about 36's as an average, *including* weaving and dyeing, also a self-contained village, was repeatedly stated to be between \$65 to \$73 per spindle. Some competition seems to exist in the South with regard to providing the most up-to-date village. In one place the operative houses had bathrooms, tiled throughout, electric cooking ranges, etc., and the roads were splendidly tar-macadamed, sufficiently wide for four motor cars to travel abreast. The nicer the village, the easier it is to attract the workpeople.

### GENERAL MILL NOTES.

All the automatic looms which I saw were under-pick motion, whilst Lancashire and the Continent favour the over-pick for the ordinary looms, by which the speed of the loom is about 30 picks per minute faster.

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Greater specialization on a few qualities, owing to the vastness of the home market, is possible in U.S.A.

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The humidity in the southern weaving sheds was very great, often 83° to 85°, and outside temperatures were 90° F. and more in the shade.

There were very few "lappers" on the weaver beams (waste yarn on beam), thus showing careful preparation in warping and slashing.

The large weft bobbins cause a great economy in battery filling.

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The reasons given why in Europe, and particularly in England, the automatic loom has made little headway are:—

- (1.) A slightly better yarn is required for the automatic loom.
- (2.) Difficulty of weaving headings on automatic looms.
- (3.) Weft is not entirely used up.
- (4.) Initial cost is too heavy.
- (5.) Difficulty with trade unions in arranging a lower basis of wages.
- (6.) Intricate technical parts.
- (7.) Automatic looms can only be used for plain goods or warp stripes.

Arguments 1, 2, and 7 are accepted, but as to intricate parts (No. 3.), of an automatic loom, we have seen cases where one tackler looked after as many as 142 looms. That is more than tacklers in Europe on plain looms of the ordinary type would undertake, and surely the European tackler would not admit that he is inferior to the American.

The weft yarn is now being used up to a few inches on each pirn owing to the new bobbin feeder, and these few inches are made use of in the waste.

The initial cost is heavy, but the investment value of a good weaver in wages that he has to earn represents £2,000 at 5 per cent. per annum. If one can produce with nine machines costing £700 the same amount of work as two weavers can produce on eight ordinary looms, one is saving money by such investment.

Mills are lavish in the supply of electric light and of good daylight.

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The lavatories are kept scrupulously clean. Each operative is provided with a steel locker.

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At many places in the mills are found white enamel drinking fountains; in summer the water passes through a cooling system. These fountains jut a spray of water into the mouth of the person on opening a tap. The fountains save a lot of time, as otherwise operatives who once leave the room for drinking purposes, have a habit of staying away longer than needed. Not so in the case of these drinking fountains.

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There is a general difference between the American-produced cloth and the British, as owing to the prevailing system of ring spinning, the yarn used in American manufacture is hard and much twisted, and the cloth resulting from it is somewhat bare and reedy, but evidently it sells.

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In many rooms of the mills square corners are avoided, especially around pillars on the ceiling. These are rounded off in order to prevent the fluff from settling in the corners. Corners on staircases and landings are often painted white; this induces workpeople not to throw rubbish about.

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The flooring of most mills is of sand-papered maplewood, and does not show any signs of splinters.

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The following differences in denomination of the occupation of the leading officials should be noted:—

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The *President* of a cotton-manufacturing company is not, as a rule, actively engaged in the mill; generally he is a large stockholder of some social standing.

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## Through Murray Gin Only

1" and above	$\frac{15}{16}$ " to 1"	below $\frac{15}{16}$ "
33.4%	41.1%	25.5%

## Through Hancock & Murray Gin

1" and above	$\frac{15}{16}$ " to 1"	below $\frac{15}{16}$ "
44.4%	33.3%	22.3%

NOTE the percentage of longer fibres preserved, and consider this value to spinning qualities and less waste.

**Specify** that your cotton  
must be ginned  
on Murray-Hancock System.

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**DALLAS : TEXAS**

**ATLANTA, GA.**  
**U.S.A.**

The *Agent*, particularly in New England, has charge of the technical work, and is equal to the technical manager of the Continental mills.

The *Treasurer* is the commercial head of the concern.

Very few yarn mills (spinning only) exist in U.S.A.; 90 per cent. of the mills have spinning and weaving combined, often bleaching, and at times also printing. This vertical organization seems to have been a great advantage.

### TAXATION OF COTTON MILLS IN U.S.A.

Figures compiled by the National Association of Cotton Manufacturers show that the average tax paid per spindle by cotton mills in Massachusetts in 1926 was \$0.723. In 1915 the average tax per spindle paid by cotton mills was \$0.253. The tax in 1926 was nearly three times that paid in 1915 and nearly four times that paid in 1896. The tax paid in 1896 was \$0.198.

All the money saved by the reduction of Federal taxes has been absorbed by the steadily mounting State and local taxes.

#### DATA COVERING 22 CITIES AND TOWNS IN MASSACHUSETTS

	Machinery Valuation per Spindle (Dollars)			Total Valuation per Spindle (Dollars)			Machinery Tax per Spindle (Dollars)			Total Tax per Spindle (Dollars)		
	High	Low	Ave.	High	Low	Ave.	High	Low	Ave.	High	Low	Ave.
1924	19.19	6.75	13.92	39.64	13.75	24.60	.531	.188	.396	1.221	.316	.701
1925	19.50	6.70	13.55	39.00	13.10	24.60	.632	.209	.398	1.095	.328	.702
1926	19.50	6.70	12.95	39.00	13.10	24.50	.633	.219	.396	1.080	.419	.720

The South offers a very complex problem to anyone who attempts to judge the average amount of taxes paid by mills in that region. Instead of having a blanket tax rate levied by the city or town as in the North, each mill has several sets of taxes levied for city, State, school or other purposes, depending on the location of the mill. For this reason the figures obtained are not considered conclusive. The figures obtained lead the National Association of Cotton Manufacturers, Boston, Mass., to the conclusion that the mills located in the Piedmont or Carolina section of the South pay about 4/7 to 5/7 of the amount paid in Massachusetts, and the mills in Alabama, Georgia and the far-South pay about 3/7 of the tax that is paid by Massachusetts mills. It appears that taxes in some sections of the South are rising rather rapidly.

With a view to attracting cotton mills to the South some local authorities and even some States agree not to charge any taxes for the first 5 to 10 years.

### WAGES AND LABOUR.

As the wages are nowhere fixed by collective bargaining, hardly two mills have the same rates. Only in the New England States do the unions fix the percentage of additions

or reductions, but the basis differs everywhere and has been fixed by individual mills to suit their own case. Generally weavers and tacklers receive the highest wages. In the South the cost of erecting and maintaining the villages ought to be added to the wages, in order to arrive at a fair comparison. The wages will be found in the particulars relating to each mill, but I cite here the following table:

WAGE AVERAGES, FEBRUARY, 1927, IN THE COTTON INDUSTRY OF U.S.A.<sup>1</sup> COMPILED BY UNITED STATES DEPARTMENT OF LABOUR, WASHINGTON, D.C.

	Per hour in dollars		Per week (55 hrs.), dollars		Difference per week in dollars
	N.E. States	Cotton-growing States	N.E. States	Cotton-growing States	
Blowing room tenters, male ...	0.377	0.240	18.10	13.20	4.90
Card tenters and stippers, male	0.403	0.253	19.35	13.90	5.45
Speeder tenters, male ... ..	0.461	0.318	22.15	17.50	4.65
Speeder tenters, female ... ..	0.399	0.285	19.15	15.65	3.50
Spinners, ring frame, male† ...	0.407	0.197	19.50	10.85	8.65
Spinners, ring frame, female ...	0.360	0.230	17.25	12.65	4.60
Slasher tenters, male ... ..	0.529	0.316	25.40	17.35	8.05
Loom tacklers, male ... ..	0.624	0.405	30.00	22.30	7.70
Weavers, male ... ..	0.478	0.331	22.95	18.20	4.75
Weavers, female . ... ..	0.438	0.300	21.00	16.50	4.50
Average ... ..	0.488	0.288	21.49	15.81	5.68

<sup>1</sup> New England States, 52 mills; five States.  
Cotton-growing States, 93 mills, five States

† Three States.

The cost of plain living for a mill operative is very little more than in Lancashire in the South; in the North the rent is high, but if an operative does not aspire to live in any bigger style than in Europe, then he is much better off in U.S.A. Only the New England States will take operatives from Europe, none, not even Lancashire workpeople are admitted to the South, they are *not* desired neither by masters nor by the men. The foreign operatives who come to New England soon abandon their frugal European style of living and expend their earnings on motor cars and other high standards of luxury, to which they were not accustomed in their own country, and very soon they find that the American wages do not go as far, or at least not further than the European wages.

The American mill operative, both North and South, seems to have an inherent desire to make as much money as possible, which is partly accounted for by the easier spending of money, and therefore he keeps very hard at work. There is no real great difference between the American and the European operative, probably the latter is more skilled, but do not forget that skill with a ring spinning machine or with an automatic loom is of minor importance; alertness and quickness of movement are greater assets.

## LEGAL WORKING HOURS FOR WOMEN IN THE DIFFERENT STATES OF U.S.A.

Source : United States Department of Labour, Washington, D.C.

No restrictions are enacted for the working hours of men.

State	Daily.	Weekly.
Alabama .. .	No limitation	No limitation
Arizona .. .	8	48
Arkansas . . .	9	54
California .. .	8	48
Colorado . . .	8	56
Connecticut ...	10	55
Delaware ...	10	55
District of Columbia ...	8	48
Florida .. .	No limitation	No limitation
Georgia ...	10	60
Idaho ...	9	63
Illinois ...	10	70
Indiana ...	No limitation	No limitation
Iowa .. .	No limitation	No limitation
Kansas .. .	9	49½
Kentucky .. .	10	60
Louisiana . . .	10	60
Maine .. .	9	54
Maryland ...	10	60
Massachusetts ...	9	48
Michigan ...	9	54
Minnesota ...	9	54
Mississippi ...	10	55
Missouri ...	9	54
Montana ...	8	56
Nebraska ...	9	54
Nevada ...	8	56
New Hampshire .. .	10½	54
New Jersey ...	10	54
New Mexico ...	8	56
New York* ...	8	48
North Carolina ...	11	60
North Dakota ...	8½	48
Ohio ...	9	50
Oklahoma ...	9	54
Oregon ...	9	48
Pennsylvania ...	10	54
Rhode Island ...	10	54
South Carolina ...	10	55
South Dakota ...	10	54
Tennessee ...	10½	57
Texas ...	9	54
Utah ...	8	48
Vermont ...	10½	56
Virginia ...	10	60
Washington .. .	8	56
West Virginia ...	No limitation	No limitation
Wisconsin ...	9	50
Wyoming ...	8½	56

NOTE.—The above table applies to women employed in mechanical and manufacturing establishments. Many States provide for overtime in seasonal industries.

\* Certain exceptions on hours of labour.

The question naturally arises, how are these working hours brought into reconciliation with the recommendations of the Washington Conference? Most of the European countries have adopted the 48-hour working week, but the country where the conference was held has not done so. Although the U.S.A. have never been a party to the Washington Conference, they attended it. Is it not time that the European countries should reconsider their decisions? Those countries which have not yet legalized the 48-hour week should take a lesson from the table on page 41.

### TRADE UNIONISM IN U.S.A.

Outside the railways and the building trades there is little effective trade unionism in U.S.A. The cotton operatives in New England are organized to about 25 per cent., but that would not represent 10 per cent. if spread over the industry of the whole country, for in the South, where the bulk of the mills are, trade unions do not exist and are not likely to establish themselves as long as the southern mill companies continue to place their operatives on a better footing than the union agitator can do. The southern mills are forced to build villages for the operatives, they provide medical attention, social and athletic clubs, swimming pools, they sell food, clothing, furniture, cows, pigs, etc., on much better terms than the operative could obtain elsewhere. Some of the mills even assist their operatives in buying on the instalment system gilt-edged stock or shares in the mills. Where this is not done by the employer, for instance, in New England, one finds that in most cases the operatives fritter their earnings away in useless, perhaps even harmful, expenditure, and thus they become dissatisfied and unwilling workers; the southern operative (all white people of Anglo-Saxon race), of course, indirectly contributes to all these comforts by accepting a much lower wage, as will be seen from examples cited in the report, but he realizes that the employer, by providing these advantages on the "wholesale" system, can do so much more reasonably than he himself would be able to do. In return for this paternal system, the operative becomes grateful and is willing to sacrifice some of his liberty of action (*e.g.* not to be a unionist, not to have liberty of action in selecting his house; he must quit as soon as he leaves the employment, etc.); this system has now worked so long, in spite of repeated attempts by union agitators that we may be quite sure that the operative has found it to his advantage to sacrifice that often illusory liberty in exchange for material advantages, and after all, legislation even in the Southern States is careful that the employer does not take an unfair advantage.

It is true the employer has manifold advantages through this paternal attitude, the principal being that he remains master in his own house, engages or dismisses operatives according to his own opinions without being afraid of outside interference, and as he can select his labour at his own choice, he sees to it that he gets self-respecting hands who will turn out an honest day's work and consequently help to reduce the cost of production of his goods.

The operatives whom I saw on my mill inspection tours did not seem any less happy than in any European country; they certainly

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GALVESTON COTTON EXCHANGE, TEXAS COTTON ASSOCIATION,  
OKLAHOMA STATE COTTON EXCHANGE.

were better and cleaner clothed than in many other countries. That restricted liberty had not made the operatives lose their self-respect. One of the mill owners told me that his principal work was not to manufacture cotton goods, but to make self-respecting decent citizens out of the poor whites from the hill country, who are not always very civilized.

Whilst the employee sacrifices a small part of liberty (which in all countries, and particularly in U.S.A., is in any case being constantly curtailed by legislation), the employer sacrifices money for this paternal institution. In normal times this welfare work is partly paid out of profits, but in bad times the employer is seriously handicapped through it, as the whole village is dependent on his continued working, and consequently he cannot readily resort to short-time running and is often forced, through humanitarian and business consideration, to go on working, piling up stocks of manufactured goods. That is a point which trade union agitators do not mention in their attacks on the paternal system.

The following copy of a trade union agreement in force in one of the cotton mills in New England shows the attitude which the unions take up on the point of improved machinery and on the loyalty between masters and men.

The agreement reads as follows:—

Agreement by and between the United Textile Workers of America, through its legally qualified officers, party of the first part, and the . . . Cotton Spinning Company, through its legally qualified officers, party of the second part, with the object of removing, as far as possible, all causes for misunderstanding and friction and of promoting to the greatest possible degree the mutual helpfulness of the two organizations.

*First:* The party of the second part agrees to a cordial and full membership recognition of the *bona fide* trade unions of its employees known as party of the first part as their proper agents in matters affecting their welfare, and further agrees that these trade unions are acceptable. It recognizes them as desirable, not only in regard to the welfare and protection of their members, but also desirable to the management, inasmuch as the co-operation of their members is essential to the continued and successful operation of the mills.

*Second:* The party of the first part agrees to promote in every legitimate way the distribution and sale of the mills' products, and other products of the party of the second part, and pledges its support in a constructive and responsible way to the end that quantity and quality production may be maintained, and *further pledges its co-operation in effecting such economies in manufacturing as may be brought by the introduction of improved machinery.*

*Third:* The party of the first part realizing that continuity of operation is essential to the successful operation of the mill, agrees that in the event of differences which may arise in respect to the details of operation, compensation, hours of

labour, working conditions, or any other matter of controversy between the management and the employees, a period of not less than sixty days shall be allowed for the proper and orderly holding of conferences between the management and the executive, or other committee of the Union, and further agrees that no action tending to disrupt production shall be taken before the expiration of the said period.

In the event of the unauthorized cessation of work by an employee the said party of the first part agrees to use every effort at its command to assist in maintaining continuous operations.

*Fourth:* The party of the second part appreciating the advantage of a spirit of co-operation and loyalty inspiring the personnel of its employees, and desiring to further cement the feeling of friendly and sympathetic understanding, agrees to use every effort to maintain good working conditions, fair wages and continuity of employment.

*Fifth:* Representatives of the party of the first part shall meet with the representatives of the second part at regular intervals, preferably once a month, or as often as necessity may require, for the discussion of any questions that may arise and for the further extension of a spirit of loyalty, helpfulness and co-operation.

*Sixth:* This co-operative agreement is binding upon both parties in spirit as well as in letter, and shall be changed only by mutual agreement, after notification in writing, served by either party upon the other at least sixty days before such change is to become effective.

*Seventh:* This agreement shall be operative for the period of one year from date of acceptance, and either party may withdraw from this agreement on sixty days notice.

---

It may be stated that in this unionized mill one weaver looks after

16 automatic looms	36 ins. reed space	} making plain sheetings
10-12     "     "	72 ins.     "     "	
10         "     "	90 ins.     "     "	

One battery filler to 36 looms and one tackler to 80 looms, and that in a non-union mill producing the same goods one weaver looked after 28 looms of 72 ins. and 108 ins. and the battery filler attended to 48 magazines.

American trade unions rarely co-operate between each other; one union will not help another to get the advantages obtained in its own organization. Only 4,443,523 workers in U.S.A. are stated to be unionized, *i.e.* 3 per cent. of the population. As I am a representative of a masters' organization I prefer to quote in further support of my description the following extracts from the book "An Australian Looks at America," written by Hugh Grant Adam, Associate Editor of the *Herald*, Melbourne (published by George Allen and Unwin Ltd., London), a strong advocate of unionism:

"The American worker gets no pay for public holidays, and only in a few exceptional cases is any provision made for vacations. *In most industries there is no extra pay for overtime, night work, or work on public holidays. The workers welcome overtime. They prefer night shifts, because on night shifts they are allowed to work for longer hours—they want the money.*"

"The relations between employers and employees in the industries where the workers are well organized are, at present most harmonious. *The unions accept the position that the worker must be efficient and must maintain a high speed of production if he is to receive high wages.* The go-slow doctrine has no support outside of the crazy minds of discredited extremists. *The unions offer no opposition to the introduction of the most modern labour-saving machinery,* and they recognize and accept the system of piecework, with the stipulation that the representatives of the workers must be consulted in determining the schedule of rates."

"From Victor Orlander (Secretary of the Illinois branch of the American Federation of Labour) I got this statement of the creed of unionism in America—

'Unionism,' he said, '*stands for efficiency in production.* It encourages the worker to gain skill. It approves of the introduction of new tools, including automatic machines, and does not believe that these create unemployment. It stands for the highest standard of living for the worker, and believes that America can have a high standard of living with low costs of production. It approves of piecework in new manufacture when it is operated on the principle of collective bargaining, but opposes piece rates in repair work. It claims, and is prepared to prove, that workers who are organized in trade unions give better work and greater efficiency than unorganized workers give. Organized labour in America claims that, by recognizing unionism and working with the union, an employer can increase his output and decrease his cost of production.'\*

I give them (masters) all credit for the strategy. They have asked themselves what material advantages have the unions won for the workers in industries that have fallen victim to unionism? With good grace they have given these advantages to their workers, and also others that are new."

"The mass-production corporations in America spend much thought and large sums of money to make it difficult for their workers to think that they have grievances. Labour leaders frankly admit that they cannot organize these workers. Each man has been bought in an individual bargain, and his neighbour's case stands in no relation to his own. There is no common grievance.

"It would be doing American employers a great injustice to say that this explanation is the only one that accounts for all the amazing things they do for their workers. Kindly, generous, sentimental people as they are, they rejoice that business policy bids them play fairy godfather to their employees. They do it, then, *because they believe that it pays; and they would not do it if they did not believe that it paid.* However, since it does pay, they like doing it for sentimental reasons."

"Meanwhile, in America, mass production and unionism cannot live under the same factory roof. The phrase 'open shop' does not mean that the workers can belong to unions or not, as they please; it means that if a man is known to belong to a union he will be dismissed. Some employers deny this, but most of them frankly admit it. From what I have learned I would say that it is true in almost all factories."

"The human factor in American industry is extensively exploited. No waste of time or energy is allowed. Whatever can be done more cheaply by machinery is done by machinery, so that all the time and energy of the

\* How different from this attitude is that which *The Cotton Factory Times* of Lancashire takes up in its issue of September 28, 1928, in a leader on "The Re-winding of Weft," the introductory remarks of which read as follows:—

"Following the press boom of the automatic loom, we have the re-winding of weft once again advanced as a medium through which cheaper production and increased output may be secured. The fly in the ointment from the operatives' point of view in relation to re-winding of weft, is that its champions invariably make it a condition that the installation of these expensive machines shall coincide with a reduction in list prices. It is difficult to conceive why this should be, for obviously the introduction of such machinery, possessing the tremendous advantages alleged, must quickly repay the employers who have the courage to speculate. Tampering with list prices on any pretext whatever only tends to rouse suspicion."

worker is concentrated on doing only that which machinery has not yet been made to do. In a mass-production plant labour is reduced to the minimum of quantity returning the maximum of usefulness. The worker never leaves the spot where his particular job is to be done. The material is brought to him by machinery, and the latest and most efficient tools are put into his hands. He has power at his elbow. The employer does not tell his workers that he depends upon their skill and enthusiasm to give him cheap production at a high speed, and then shut himself up in his office and leave them to it; he ensures that he will get cheap production at a high speed by the organization of his plant, by the provision of marvellous machinery and an ample supply of electric power."

"To realize the position it is necessary to understand that the groups of large and prosperous industries are controlled by vast horizontal trusts. These trusts are enormously powerful and enormously wealthy. It is impossible to get at the bottom of their ramifications.

This has a very important bearing upon conditions of manufacture. For example, I found conditions in the Chicago plant of the Western Electric Company that were so much above the general run of factory conditions in the district that they promised to have an important bearing upon my inquiries. There, surely, was the highest development of American industry on the lines of factory organization, mass production, piecework, and care for the welfare of employees. I could not help being deeply impressed by the beauty, the orderliness and the smoothness of modern industry conducted on a scale unimagined in Australia, and by the comfort and well-being of the workers in a place where the management was genuinely concerned for their welfare.

All the evils I had seen of workers driven by the inexorable machine were here eliminated. It was easy to be convinced that if all employers could be trusted to conduct their industries in the same manner the workers' hostility to piecework would soon break down. I saw girls each attending to as many as twelve automatic machines, and I would class their work as light and pleasant. There were no signs of haste, of pressure, or of overspeeding in any part of the plant. Girls at machines producing worked steel castings were wearing silk stockings and pretty clothes. They worked in as much comfort and neatness and cleanliness as girls in a modern business office do. I heard how the management looked after their employees when they fell sick, how it ran cost-price stores, a school, a home-building society, recreation clubs, and athletic grounds; how it helped the workers to invest their money in gilt-edged stock, and even lent money without interest or security to employees in financial difficulties."

"Finally, just to keep the balance, let me quote the manager of a great factory in Brooklyn. 'This factory,' he said to me, 'is an open shop because the unions almost ruined the plant. Under unionism it would take four years to learn the trade, while under present conditions an employee is trained in six months, and earns good money.'"

"The method generally in force for the fixing of piecework rates is as follows :-

The company engages, either temporarily or permanently, a staff of time-study engineers. For each process in the manufacture of the product these men work out the number of units the average worker should be able to turn out in one hour. The company then determines, from a study of the local market price of labour, a minimum wage rate for this class of work, and fixes a price to be paid per unit. That price will enable the fast and industrious worker to earn from 20 to 30 per cent. more than the minimum wage. This enables the average worker, who is neither fast nor industrious, to earn something near the minimum rate, although most employers admit that they are not inclined to keep employees who persistently fail to earn more than the minimum."

"It is impossible to study American industry without being impressed, above everything else, by the enthusiasm and genius of its management. Management has become a definite profession, almost an exact science, taught in the great universities just as thoroughly as the professions of medicine or law. The practitioners of this profession are as distinct from the owner class in industry as the workers themselves are. It is becoming exceptional in America to find the owners of industry taking an active part

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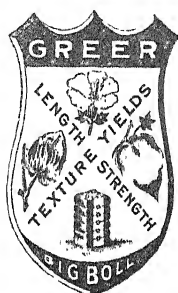
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in its management. Their interference would be looked at askance and with resentment."

"The man who has put up the money does not assume any right to interfere with the methods of management. If the manager does not secure satisfactory results the owner does not bother to investigate his methods or to look for the faults in his system. He does not claim to be an expert in the science of management. What he does is to dismiss the manager, and go on appointing and dismissing managers until he finds the man who can get him the return on his money. Once that man is found he is cherished. His authority upon all matters obtaining to the conduct of the business is generously acknowledged. He is extremely well paid. His own pocket profits largely by the success of the business."

"This system is, I believe, one explanation of a fact that amazes business men from other countries—the freedom with which the men controlling rival businesses discuss their methods and their problems with one another. These trained and expert managers regard their profession of management in much the same way as the scientist regards his science. They believe that new ideas and new discoveries should be shared freely. In their systems of management, their organization, their elaborate tabulations, they have created something that has for them the satisfaction and the beauty of a science. They are developing and spreading a love of efficiency for its own sake. Efficiency is perhaps the most valuable factor of any nation's industry."

"It is cheaper to move the tools and the work to the men than to pay for the wasted time and wasted effort resulting from men moving between the tools and the job."

"There has been unwavering faith, backed by huge investments of private money, that a cheaper supply of power will always create a greater demand. That faith has been fully justified."

## PSYCHOLOGY IN THE COTTON MILLS.

American wages in the Cotton Industry are relatively higher than in Europe, but not always the real wages, if they are worked out per pound of yarn and per yard of cloth, as is clearly shown by the examples given in the Appendix to this report. The American operative has a greater productivity, due to the high degree of co-operation between employer and employed. Even where trade unions do exist, they accept as a fundamental the position that the operative must be efficient and must maintain the high speed of production which the "efficiency experts" of any mill may determine. The agreement between a large cotton mill in the North and the trade union, printed on a previous page, clearly sets out that the union will not oppose the introduction of high speed production machinery, specialization of labour. A union's concern is to obtain high wages on the understanding that high wages are compatible only with high speed efficiency and modernization of the plant.

Every foreman is made to feel that he is directing the destiny of the people directly under him; he is supplied with statistics showing the weekly or daily output of his section, possibly some bonus is offered to him for increased production, he is given a fair amount of responsibility as to dealings with the operatives. Generally there is a foremen's conference at stated periods under the chairmanship of the technical director, when these men receive general instructions as to the march of the business, shortcomings are pointed out and discussed, suggestions invited, cost of production, statistics and output are studied. All this not only means instruction and training, but it

inspires these men with an *esprit de corps*, which is a very valuable asset. When the foremen return to their work they attempt to instil this same co-interest into the operatives under them and so it comes that there is a mighty spirit of "a desire to help and get on" existing in all the ranks of workers of a mill. We, in Europe, foster this team-spirit in universities, colleges, schools, clubs, in the armies, navies, etc., but when we come to the army of mill workers, are we not neglecting to cultivate that loyalty?

The American industrialist who pays a wage of say \$20 a week to a weaver, argues that these wages represent an investment value of some \$17,000 at 6 per cent. per annum.<sup>4</sup> Supposing that he is about to buy a machine worth that amount, how much time and thought would he spend before he really decided upon purchasing that machine? Is it not therefore necessary that in the engagement of each individual operative a similar amount of trouble is taken in finding out whether he is really a suitable man for the position? Again, the American industrialist argues, how much time is spent in keeping that \$17,000 machine in proper working order? Should he not devote similar attention to keep his operative in good working condition?

The American mill owner must be given the highest credit for the introduction not only of this spirit of co-operation, but also for having devised means that will increase the output and lower costs, and being constantly on the look-out for improvements, not hesitating to scrap a machine which has become obsolete, owing to an invention of another.

The employer is always studying the psychology of his work-people. The spoken word of instruction in the mill is hard, it is often conveyed too drastically, or the very intonation of the voice may cause offence. With a view to avoiding any discontent under this heading the mill owner has put up printed notices in every room, at different places. Such notices are carefully worded, often by some clever advertisement-writer. "Safety first" is a movement that has spread from America all over the world. There is a central organization that issues periodically new pictures showing how accidents occur, with appropriate wording. The question of fire prevention is stimulated by a notice somewhat on these lines: "We are anxious that every one of you will keep his job, but if a fire occurs in this mill it may rob you and others of your work and daily bread, therefore no matches should be brought into this building, no smoking . . . It is your duty of self-preservation to see that, etc. . . . In one mill in the North where the operatives belonged to different nationalities, they had not only several American flags hanging from the ceiling, but also the words: "This is *now* your flag." These notices are not written in small type, but printed in large and neat letters. These silent, polite and persistent exhortations have indeed an immense effect, coming constantly before the eyes of the workers. We all have in our daily life of recent years become accustomed to such silent exhortations as "Stop"—"Drive slow"—"White lines" on the roads, etc., so that we have unknowingly learnt to obey them, and it is this fact which underlies all these silent persistent appeals.

In the same category is the fixing in a very prominent place of the pick-counter-clocks on the looms, which exercises a wonderful silent stimulus to work.

It may be said that the employer co-operates in all directions towards making the operative a higher producing unit or even part of the machine, but in doing so he not only benefits the business but also the earning of the individual operative and his happiness.

The American employer sees to it that in their works they have no workers that are likely to stir up strife and trouble, and for this purpose "industrial investigation detectives" are frequently employed in large factories.

### NEW USES OF COTTON.

The introduction of mass production dictates simultaneously an extension of the consumption of cotton goods.

Along with the assistance of a special section in the Department of Agriculture, the Cotton Textile Institute, New York, has devoted considerable activities in the direction of finding new uses in which cotton can be employed, and generally in bringing about an increased consumption of cotton.

The fact that the consumption per head in U.S.A. is about 24 lbs.,\* whilst in England it is only 15 lbs. to 16 lbs., in Germany after the war it was less than half, but now it is about 12 lbs., shows that we can learn from America many ways, established there for long enough, by means of which we in Europe could increase the consumption of cotton and, incidentally, improve the turnover of the cotton mills.

### MORE FREQUENT CHANGING OF SHIRTS.

The Americans have educated the public to an increased use of cotton shirts. Amongst the better-class people in the large cities there are few who do not use a clean shirt every day, and very few self-respecting individuals would venture to wear a shirt longer than two days before having it washed. It is this modern chemical and mechanical way of washing which has proved to be the great friend of the cotton manufacturer by ruining a good-quality shirt after comparatively few washings. Would it not be advisable for the cotton industry to teach the European public by advertisements and newspaper articles the great sanitary advantages of a clean shirt every day? Probably the laundry industry would co-operate in such a movement.

### COTTON-FACE CLOTH.

In America, in private houses and hotels, the use of a cotton cloth, 8 ins. x 11 ins., a rough canvas texture, is universal for washing the face. These face cloths are much cheaper than sponges. They are provided free of charge to the hotels and clubs; with each cloth is a card advertisement, typically American, but worthy of imitation in some countries. It reads as follows:—

#### DO YOU LIKE THIS \* \* \* CLOTH?

You certainly do if you are a particular person, because it is so clean and easy to use, and because its ventilated weave makes it dry fast and sweet.

---

\*The very large use of cotton in the motor industry and in conveyor beltings accounts partly for this high figure.

How would you like

BIG, FULL-SIZED \* \* \*  
BATH TOWELS

woven in this same material, only about twice as thick? Can you imagine the fine rub down they would give you, and how quickly and sweetly they would dry? So that you can try them, we have made up a special package of two big, heavy \* \* \* Bath Towels (each nearly four feet long), two face Towels, one Wash Cloth and one Bath Mitt for only \$2.00. Delivered anywhere in the United States and possessions, all charges prepaid. Each piece is sterilized and sealed germproof in glassine paper. You can see what a remarkable value that is, and once you use them, you will never be satisfied with old-style towels.

MONEY BACK, OF COURSE!

All our goods (which are sold all over the world) are on a money back guarantee. If you are not perfectly satisfied with anything we send you, return it within five days, and your money comes back to you by first mail, without any correspondence or argument. All you need to do is write your name and address on the other side, and put this card with \$2.00 in envelope addressed to

\* \* \* TEXTILE MILLS,  
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SPECIAL OFFER ORDER CARD

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You may send me your special package of 2 big heavy \* \* \* bath towels, 2 face towels, 1 wash cloth, 1 bath mitt, sterilized and each sealed in glassine paper, for which I enclose special price of \$2.00 in ... check ... stamps ... cash ... money order.

It is understood that if I do not like these big new towels and cloths I will return them to you within five days and you will send back my money without question.

Name.....

Address.....

City..... State.....

I usually buy my towels at.....

Address.....

This card creates customers. Why should we not emulate that example? Human nature is the same everywhere, and falls to a well-reasoned and well-worded advertisement of a good article.

#### FABRIC ROAD SIGNS.

Cotton cloth is now, after several years of successful trials, being extensively used for the white lines in streets for directing the traffic; some lines are also in different colours. Words of direction for motor traffic, like "Slow," "Dead slow," "Stop," "No

parking," "Parking 10 minutes," "Loading zone," "Keep right," etc., are painted on cotton canvas cloth, and each sheet with a letter is fastened to the road by means of an adhesive gum, which is guaranteed to stick the cloth to all pavement surfaces, from asphalt to brick or blocks, under all traffic conditions. Where the cloth comes off within three months replacements are made free.

With the huge motor traffic which America has, and which we in Europe will get to a similar extent in the not distant future, this kind of canvas cloth seems to offer an opening for some enterprising firm, at all events in England, where motors are already becoming quite numerous. The letters are 15 ins. x 30 ins. Testimonials to show that in heavy traffic these letters have withstood two years' wear have been given by corporations. The ordinary paint direct on the pavement or on country roads requires to be renewed very frequently, and the work is hard and dangerous. The dividing lines on some roads in New England run for miles. The white lines and traffic signs in the Holland Tunnel, New York, where vehicular traffic is exceptionally heavy, are all of this fabric type.

The system of fabric lines and lettering may be used for railway platforms. It is extensively used for road indications, to direct the way, in which case the fabric is often gummed round a tree trunk. The Wamblu Corporation, 1326, Ridge Road, Rochester, New York, has specialized in this new cotton article.

#### OSNABURGS FOR RECEPTACLES.

One mill that specializes on weaving Osnaburgs has started a special department for making various kinds of receptacles by stitching Osnaburgs over steel frames that are fastened to a wood floor, and in some cases they were woven in tubular form, and merely stripped over the frames. In that way they were substituting skips; we saw such Osnaburg doffing boxes in use in several mills. All kinds of receptacles were being made and sold, mostly direct to the users.

#### CHENILLE CARPETS.

For bathrooms or bedrooms, entirely made of cotton, was another new venture of a cotton mill which we visited.

#### RAZOR WIPERS.

Small cloths of flannelette type are found in hotels and private houses for wiping razor blades. With the almost universal use of automatic razors in Europe there should be a market for such a cloth. If one considers that each room in a hotel can use one of these cloths almost daily, one realizes the amount of cloth that might be sold for it. Of course, hotel managers must be shown by advertising the real advantages of this razor-wiping cloth, for it saves many more expensive towels, which otherwise only too frequently get cut.

#### CANVAS BAGS FOR LAUNDRIES.

The washing of clothes has become everywhere an industry in which modern methods are used. The soiled linen of each house-

hold is collected in one of these bags, which represents an annual use of several millions.

#### OPEN-WEAVE COTTON FABRIC AS BINDING MATERIAL IN ROAD CONSTRUCTION.

Mr. Charles H. Moorefield, State Highway Engineer for Columbia, South Carolina, has in experimental use an open-weave cotton fabric in the bituminous surface treatment of top-soil roads. What is known locally as top soil is essentially a very small size gravel, with a mixture of sand and clay as binding material. The section of road on which the cotton fabric was used was first scarified, and as it gradually rebonded under traffic, was kept smooth by the use of road machines or drags. The bituminous treatment was as follows:—

A light tar, of eight to thirteen specific viscosity (Engler, 50 cc. at 40° C.) was applied at a rate of one-fourth gallon per square yard. The cotton fabric was spread in longitudinal overlapping strips the next day, while the tar was still sticky enough to hold the fabric to the road. Approximately 0.4 of a gallon per square yard of asphalt of 150 to 200 penetration (100 grs. 5 secs., at 25° C.) was then applied hot, and immediately covered with about 50 lbs. per square yard of very coarse sand, which was found to be considerably more sand than was actually needed.

The mill that made up the cotton reinforcing particularly for this work states that "This fabric weighs approximately 7 ozs. to a 40-in. width, but was made 55 ins. wide. The counts and yarns are 7-ply of yarn 4's. This fabric was classed as cider duck, as it is very similar to an open-weave class of goods, which is used for making bags to load hydraulic cider presses or tankage presses."

This experimental surface treatment has been under traffic approximately two years, which is too short a length of time to warrant definite conclusions.

This open-weave cloth is spread out on the foundation of the road, and the bituminous treatment is applied on it.

#### COTTON CLOTH FOR WALL COVERINGS.

On the Continent of Europe and in America the better-class houses are "papered" with cotton cloth, some in coarse canvas weave, others embossed and milled in imitation of silk. There is still a greater scope in this direction.

#### CONVEYOR BELTINGS.

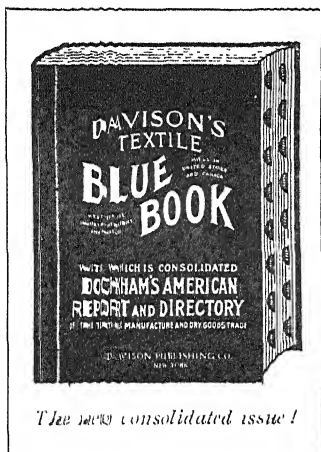
With the more general introduction of mass production in all industries, where the underlying idea is to bring the work to the worker, cotton belting conveyors are being used more extensively. What we witness at present in U.S.A. will gradually find its way to Europe.

#### DIRECT SALES.

The trend everywhere is to cut out the middleman. In former years he kept stocks, but since the war he buys from hand to mouth and expects the manufacturer to keep the stocks. The manufacturer rightly argues that in that case he might as well go direct to the consumer, and with the great development of stores, chain stores

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Codes } Meyer's, 39th, 40th;  
          } Shepperson's 1878; Bentley's  
          } Private

and mail-order houses, this direct sale is not as difficult as it was in former years.

A useful phrase in advertising cotton goods was recently used in a Belgium shop; it read: "This is not artificial silk, but mercerized cotton."

#### RENAISSANCE OF COTTON.

At the Cotton Textile Institute, New York, I was shown extracts from the Press, emphasizing the renaissance of cotton. Women in America have become tired of aping the imitation man, and a vogue of femininity is gaining ground in the world of fashion. Dresses are becoming fuller, with flounces and flares, and during summer some Parisian fashion papers started the cry of cotton dresses. That fashion has certainly caught on, as one can see in America, mostly fine-printed cotton goods are being worn. This cry is being confirmed and spread by the Textile Institute, New York; they hope to have very shortly a large fund for advertising the cotton dress craze. They have a lady and a gentleman working solely on this subject; they visit the big fashionable shops, interview the creators of styles, and prepare articles with illustrations for the Press. The Institute is positive of success in this direction by such an advertising campaign. There are many who see in this cotton dress vogue a great opening for the cotton industry which will materially influence consumption. Rayon seems to have done the worst for cotton; it is not likely to make any further inroads. Women have got tired of it, and it is only the ease with which washing of artificial silk garments can be carried on in the bathroom that has kept rayon going so long as underclothing.

This cotton dress movement is probably due to the initiative of the National Association of Cotton Manufacturers at Boston, Mass., which first formed a group of manufacturers of ladies' dress-goods with a view to influencing the fashion in favour of cotton by means of holding style shows at stores in many American towns, mannequin parades and visits to fashion creators.

How successful these shows can be is enumerated in the *Transactions* of the National Association of Cotton Manufacturers, Meeting No. 122, where the lecturer stated:—

"S. & C. gave us a stage and runway on the fifth floor, a three-piece orchestra, six models, a large dressing room, and all possible comforts. At the first performance they had chairs for 250, adding more at each performance until they had put in about 500 chairs, which were all they had room for. The show was so well advertised that people stood at each performance. Women came an hour ahead to get seats. I saw two women at three performances.

The sale of goods was excellent. The buyer had arranged goods at the back of the seats and had clerks to handle the sales—both before and after each performance. I understand he was most gratified with the direct returns, and anticipated a very good spring and summer business in addition. The patience of women and their interest in such shows were well shown here, for frequently women began to gather an hour to an hour and one-half before the time advertised for the show to begin; frequently there would be eighteen or twenty sitting waiting an hour ahead of time."

The European cotton industry might proceed on similar lines, pushing the merits of cotton. Make customers for the goods you produce; that is a lesson one learns when travelling in America. In a well-managed community advertising campaign, in which these

shows should be the main centre, all the trade organizations connected with the cotton industry—who are all likely to benefit by it—would probably co-operate. Not only the cotton spinners and weavers, but the finishers, bleachers, dyers and printers ought to contribute to such a fund; also the Cotton Exchanges of the world. Such a campaign, undertaken simultaneously in each country and city, but particularly in Paris and London, would show good results. Of course, you will have to employ first class men who have a thorough knowledge of the inside working of publicity and women who have experience in the world of fashion. Secondary shows would damage the interests which are aimed at.

The following fashion papers have had recently articles on this question of the renaissance of cotton:—

*Vogue*: “The Cotton Renaissance Has Charming Results.”

*Harper's Bazar*: “The Return of Cotton is Welcome.”

*Paris*: “Lanvin Features Organdie”; “Patou Features Pique Blouses and Jackets”; “Lelong Features Tennis Frocks”; “Chanel, Worth, etc., Feature Cotton Garments.”

*Woman's Home Companion*: “A Cotton Tale: The Long and Short of It.”

*Fashionable Dress*: “Cotton Frocks Again Come Into Their Own.”

*McCutcheon's*: “Cotton High in Style Favour.”

*Fashion Co-ordination Bureau*: “It's Smart To Be Washable.”

*Holland's Magazine*: “Cottons Worn Twice As Much As Silk for Sports.”

*Ladies' Home Journal*: “Picturesque Robes de Style of Organdie.”

The magazines, pattern companies, trade papers and stylists interviewed by the Cotton Textile Institute have expressed themselves as follows:—

“Cottons have a new fashion prestige.”

“There is no question of the fact that cottons are on the up-grade.”

“Cotton frocks have more fashion importance.”

“Cottons are constantly gaining, and will go stronger next year.”

“The vogue for cotton is growing.”

“I expect next year to be a big cotton year.”

“Next year should be a splendid cotton year if the right patterns are shown.”

“I am advising all my clients that cotton dresses are the height of fashion.”

“Cottons are worn by the *haute monde*; according to the normal development of a fashion, cottons should be generally worn next year.”

There was only one dissenting voice to the general opinion that cotton has come back, and this particular person made the following statement:—

“ This would have been a big cotton year if the right style cottons in the right qualities had existed to satisfy public demand.”

The Cotton Textile Institute has investigated the question of the vogue in cotton during six weeks, supplementing personal visits by questionnaires. The following eight answers have resulted, which emanate from 116 department stores in 64 different cities, 18 garment manufacturers in New York City, and 22 cotton-dress cutters in 16 different cities, 11 leading converters who are known by all America and whose goods enjoy a national distribution, cotton mills themselves, 16 trade papers, fashion publications, pattern companies and stylists, and nine miscellaneous sources:—

1. That there are more cotton dresses worn.
2. That cotton is gaining fashion importance.
3. That more cotton fabrics were sold by the converter—even if the profit showing in many cases was unsatisfactory.
4. That more cotton dresses were manufactured, and that there are more dress manufacturers featuring cotton.
5. That more cotton dresses were sold by the retailer.
6. That the retail sales of cotton piece goods are ahead of 1927, in spite of losses incurred by some stores.
7. That the retail stores are advertising cottons more extensively.
8. That the majority of those interviewed believe 1929 will be a bigger cotton year.

#### SHEETINGS.

Under this same category should be mentioned what has been undertaken by the manufacturers of bed sheets in America.

The Department of Commerce, under Mr. Hoover, has used its influence in bringing about standarization in all industries. We know that in raw cotton the various grades have been standardized, and this year has seen the standards for lengths of cotton. This spirit of bringing about greater uniformity and consequently a lesser cost in production has permeated all industries and also the cotton industry of U.S. The greatest progress has been achieved in sheetings. In the first instance the hospitals and Government institutions (barracks, ships, etc.) were persuaded into the necessity of having slightly longer sheetings than previously. This movement caused a reduction in the various sizes of bed sheets from 54 to 4, standardizing on 99 ins. and 108 ins. lengths. It was agreed that the 108 ins. sheet was to be the proper length for the institutional bed, although the original inquiry showed that only 20 per cent. were in the habit of ordering 108 ins. length.

Lately the standarization of bed sheets for home requirements has been taken in hand by the Cotton Textile Institute, and with

this purpose in view it has broadcasted a well illustrated booklet, printed on good paper and in first-class style, which I recommend for emulation in the various countries and therefore give the actual text.

The cotton mills in U.S.A. which weave sheetings, also cut them up, hem them, etc. It will be readily understood that the use of longer sheets means an increased consumption and therefore this booklet is a clever piece of co-operative advertising on the part of the sheet manufacturers.

This booklet is one of the many ways in which the American manufacturer is educating his customers, in fact is creating new markets.

In Oklahoma, the State has passed legislation requiring the use of 108-in. sheet as minimum length in hotels. Housekeeping journals, women's magazines of all kinds, converters, shopkeepers, all over the States, have been circularized and the result has proved very satisfactory. Here are some extracts from this booklet :—

#### WHAT A SHEET SHOULD DO ?

Sheets should contribute to personal comfort and health.

Sheets should provide adequate protection to the individual users and to the bedding with which they are used.

Sheets should conform to the accepted principles of good taste and individual economy.

Sheets that are long enough will give the greatest satisfaction in each of these respects.

#### FOREWORD.

In the modern household, economy and system are rapidly eliminating haphazard methods. Better standards of living put greater emphasis on comfort and convenience. At no time has the homemaker had a greater abundance of accurate, helpful information about matters of personal interest to her than she now has.

On the pages that follow are statements which deal with a familiar necessity in every home. Sheets are truly commonplace, and yet it is only within recent years that they have received the intelligent consideration which should be given to them. When the facts are considered fully and fairly, there can be only one conclusion—that sheets to be most useful as well as economical must be *long enough* to do the things for which they are made.

#### WHAT LENGTH SHEETS ?

Sheets are a familiar necessity of daily life. Like many other essentials, they are so commonplace that few persons realize the importance of adequate length in sheets or the manner in which they affect individual comfort and health. In a very real sense they may reflect important standards of personal hygiene.

#### USUAL BUYING HABITS.

The average woman buys sheets so seldom that size is not always impressed as a consideration. It is therefore natural that these familiar and practical household necessities may be supplied in a haphazard manner—suggested by a seasonal offering of merchandise, an attractive price, or a size selected at random. This is very largely responsible for the variety of inadequate, unsatisfactory sizes which can be found in so many homes to-day.

Apart from such factors as quality, finish, cost, etc., there should be a clear definition of what is meant by adequate length.

## THE 108-INCH SHEET.

For purposes of illustration, the 108-inch sheet may be taken to show the great importance of length. Discriminating consumers and merchants recognize this as the best size, and many have urged that it be adopted as standard.

## TORN LENGTH.

Usually a sheet which is sold as 108 inches in length means the torn, or maximum, length before hemming. Useful length must be determined by making deductions for hems and shrinkage.

## HEMS.

Hems may vary. Sheets may have a wider hem at one end to indicate the top, or they may have hems of equal width. Some large consumers of sheets, like the Pullman Company, prefer hems of the same width for the sake of convenience and greater speed in making a bed or berth. Some prefer hems of different widths in order to distinguish between the top and bottom of the sheet. Because this is considered an arbitrary designation, there are many who favour hems of equal width so that either end of the sheet may be used as the top, and for the further reason that the sheet will wear more evenly.

## LENGTH AFTER HEMMING.

The Textile Engineer of the Cotton Textile Institute measured 208 sheets that were 108 inches in torn length. These represented 23 mill brands. The average length after hemming, and when the sheets were ready for sale, was found to be 103 inches.

## CHANGES IN DIMENSIONS.

Under present methods of manufacturing and laundering, new sheets, when laundered, may show a decrease in length, commonly known as shrinkage. This reduction in length may continue for several consecutive launderings. At the same time an increase in width may be expected.

Tests with 45 sheets, representing several brands, were made in a laundry operated under methods approved by the Laundry Owners' National Association. These showed an average shrinkage of more than  $4\frac{1}{2}$  per cent. after 75 launderings. Other tests have shown a decrease in length, in some instances as much as  $7\frac{1}{2}$  per cent. Inasmuch as sheets in a commercial laundry are placed in the mangle from selvage to selvage, the width is commonly increased while the length diminishes.

Based upon the best available information, a reasonable allowance for shrinkage in the length of 108-inch sheets would be at least 5 inches.

## USEFUL LENGTH.

The combined deductions for hemming and a reasonable allowance for shrinkage in length--each 5 inches--would reduce 108-inch sheets to a net useful length of 98 inches. Even this length is not considered sufficient by those who are fastidious in such details. A few simple tests in bed making, and comparison of the size of bed equipment, will demonstrate the advantages as well as the economy of longer sheets.

## BEDS AND BEDDING.

The length of sheets should be determined in relation to the length of the bed and the dimensions of the mattress. Beds for home and hotel use have been standardized at 78 inches in length, with an average length of the mattress from 75 to 76 inches. The average thickness is 5 inches, although in some mattresses the thickness may be 7 inches.

## TWO FACTORS IN COMFORT.

In order to give the greatest service in comfort and protection, and make a bed that will look well, sheets must be of sufficient length to do two things. The *lower sheet* should be long enough to have six or seven inches for tucking at each end in order to be held smoothly and securely in place. The *top sheet* ought to be long enough to tuck in firmly at the foot of the bed while the top is folded back generously over the other covers at least

half a yard. The top sheet should be the same size as the sheet covering the mattress. Both sheets should have ample width, so that the sides may be tucked under and held firmly in place.

#### PROTECTING THE MATTRESS.

A mattress is a real household investment. One of the practical, as well as the hygienic, necessities for sheets is to provide protection for this part of the bed as well as protection to the occupant of the bed. Mattresses last longer when protected. They are cleaner and more hygienic when proper covers and ample sheets are used.

#### PROTECTING BLANKETS.

Climatic conditions require the use of blankets for considerable periods of the year. These can be used with greater economy and comfort if the upper sheet is long enough to turn back generously at the top. At least half a yard, or more than the length of the forearm, should be allowed for this purpose. Blankets often irritate the face and hands, and this can be eliminated by using sheets that are long enough to keep the unpleasant surface removed.

Blankets and similar coverings can be kept clean and free from germ transmission when the top sheet is long enough for a generous turn back. If blankets and bedding are cleaner they will be more hygienic, as well as more economical by reason of reduced laundry expense.

#### THIRD SHEET.

During certain seasons of the year many persons have found greater comfort could be obtained by substituting a second top sheet for a blanket. Use of a third top sheet is advantageous in three respects: it provides comfort, it may be more conveniently laundered, and it reduces cost of blanket laundering.

The Pullman Company has for years had as standard practice the use of a third sheet on the top of the blankets. This serves as a counterpane and gives a more finished appearance to the car when the berths are made up. It is even more important for protecting the occupant of the berth from contact with the blankets.

#### ART OF BEDMAKING.

In addition to these fundamental considerations, there is a real art of bedmaking that few persons seem to appreciate or cultivate. When scrupulous care for comfort and health is so emphatically the rule in the modern home it is worth while remembering that the appearance of a comfortable, neat and hospitable bed is not accidental, but the result of a well-defined purpose and the reflection of individual refinement and good taste.

Short sheets are bound to be an annoyance, a disappointment and poor economy. It requires sheets at least 108 inches long to provide real economy and satisfaction.

The further development of the cotton industry of Europe appears to the writer to depend to a considerable extent, not simply in filling the demand which may present itself, but rather on the persuasive power of the manufacturers to create such new demands as are mentioned in this chapter.

Of course, these enterprises require capital, originality and sound advertising methods. We were told that all these novelties were paying after about a year's experiment.

### INSURING MANUFACTURED COTTON STOCKS AGAINST FALL IN PRICES.

In my conversations with the heads of future houses in New York several drew my attention to the necessity on the part of the cotton manufacturer to insure his manufactured stock

against a fall in prices. Manufacturers in pre-war days never thought about the fluctuations in the value of their cotton yarns or piece goods stocks, which a fall in the price of raw material might bring about. They could well afford 10 or 15 per cent. decrease, but now in after-war days we are getting accustomed to changes in the price of raw cotton of 30, 40 or even 100 per cent. in one season, and therefore one ought not to expect that pre-war methods will still stand good. The future houses say that cotton manufacturers, and also cotton goods exporters, throughout the world have unconsciously been gambling with their stocks of manufactured goods and that they should hedge these stocks by futures. Anyone who has stocks of yarn or cloth is really long of cotton and if he were a raw cotton merchant, taking such risks without hedging, he would soon be accused of gambling. It is admitted that the hedge is not an absolute insurance, but perhaps to 80 per cent. Had the shipping merchants and manufacturers hedged their manufactured cotton goods stocks in 1921, at the end of the boom, there would not have been the disastrous consequences which have followed. Dealing in futures under such conditions is not gambling, but a sound method of insurance against loss, just the same as a fire insurance, and the big New York future houses are daily doing this business on behalf of American cotton manufacturers.

Wrenn Brothers & Co., New York, in one of their circulars, put the case clearly, and I therefore quote the following extracts:—

“ We asked one of our southern mill friends who, we happen to know, relies on manufacturing profits as against profits arising where a mill buys its cotton before selling its goods, or vice versa, whether he agreed with the foregoing conclusion and to what he attributed his success. He replied that, in his opinion, ‘ cotton manufacturers generally speculate too much through failure to hedge,’ and that he tried at all times to keep as nearly even as possible by buying cotton or futures against goods sold or by selling futures as a hedge against stocks of unsold goods or against holdings of raw cotton not protected by sale of output.

His most striking contribution, for which we are much indebted to him and which we heartily endorse, was that involving proper distribution of selling pressure as between cotton, on the one hand, and cloth and yarn, on the other. He emphasized that, as a general rule, manufacturers, in buying cotton without selling goods or futures, are working against their own interests as they are, in effect, “ bulling ” cotton and “ bearing ” goods by supporting the former and building up a long interest in the latter which must serve to depress prices thereon.

He pointed out that, by pursuing this policy, they tend to so narrow the margin between the cost of cotton and the selling price for goods as to greatly reduce or wholly eliminate profits, whereas they can, whenever for any reason the margin becomes impaired, help to widen it by selling futures against their goods, such hedges to be bought in later when the goods market is in position to absorb the goods.

Extensive changes have occurred in the textile business during the past few years. Conspicuous among these has been the increasing difficulty encountered in effecting long-term sales of output as a result of the hand-to-mouth policy of purchase so widely adopted by buyers. Increased risks, too, have been injected by more frequent and more far-reaching style changes. These, together with the wide fluctuations to which raw cotton is subject, appear to us to render use of the contract market by textile operators more imperative to-day than ever before not only as a matter of protecting the margin between cotton and goods but also of safeguarding against losses incident to price changes.

Frequent disparity between goods and futures is given by some manufacturers as the basis for their opposition to use of the latter. Similar disparity often prevails between spots and futures but this does not deter successful spot merchants from using contracts for hedging purposes. They have found, through years of experience, that losses incident to changes in differences between the two are small compared with those which accrue when they fail to hedge and thus go "wide-open." Differences often change from \$3 to \$6 per bale in the course of a year, sometimes even more, but cotton itself frequently fluctuates from \$25 to \$60 over a similar period.

We also have reason to believe that much of existing prejudice among manufacturers against hedging with futures is due to unsatisfactory results they have obtained from occasional use of the contract market and then only after substantial losses had accrued on cotton or goods hedged. This objection, in our opinion, will largely disappear if manufacturers use futures regularly as a consistent policy instead of only when they feel impelled, under pressure of circumstances, to do so.

In this connection, we are firmly convinced that *real success in hedging with futures can be attained only by 100 per cent. use of them, uninfluenced by market opinion.*

When cotton is substantially below cost of production, as was the case during much of 1926-27, some departure from 100 per cent. hedging of cotton or goods with sales of futures appears justified. Under such conditions, the element of risk on the former is reduced to a minimum while the latter, by virtue of the broadened demand which such a level of prices stimulates, have a happy faculty of taking care of themselves. At such times, too, manufacturers frequently find it advantageous to cover their requirements for long periods ahead through purchase of raw cotton or futures in excess of forward sales of goods. But these appear to us the exceptions which prove the rule of 100 per cent. hedging.

'We never speculate,' is the slogan of the most powerful organization ever built up anywhere for the purchase and sale of actual cotton.

'We rely on manufacturing profits alone,' is the declared policy of some of the most successful mills of which we know.

The satisfactory returns enjoyed, year in and year out, by textile manufacturers who promptly buy or sell futures the instant these are necessary to ensure an even position demonstrate that 100 per cent. hedging not only pays but pays handsomely. We can conceive of no more convincing argument in favour of such a policy.

Quotations of the New York and New Orleans Cotton Exchanges for future delivery form the basis of a large percentage of transactions in both cotton and goods and these quotations cannot truly reflect conditions unless the facilities provided by these institutions are used freely by all branches of the trade. Otherwise, more or less artificiality is certain.

We submit that more general use of the futures markets for hedging purposes by textile manufacturers would make possible more successful performance of the economic functions for which the Exchange exist and would, at the same time, ensure larger and steadier returns on their invested capital."

## INSTALMENT SYSTEM.

"Buy the sweet way,  
Ten months to pay"

is the slogan which one sees in the Underground and everywhere. The middle-class of America buys motor-cars, household furniture, refrigerators, ice machines, wireless sets, washing machines, vacuum cleaners, clothes, holidays, journeys, groceries, and of course, houses, by the much advertised "sweet way," and as America has passed through a long period of prosperity, millions of workers have found that their incomes increased more rapidly than their standard of living, with the result that they had plenty of money for the payments of the always more expensive "sweet

way." Millions of operatives have in the same way been enabled to buy stocks and shares and have become capitalists, opposed to strikes and are consequently more willing workers than before.

The instalment system has many friends and enemies. Some there are who maintain that it has brought about the insolvency of the American homes, but others show by facts and figures that the instalment system has indeed taught the people how to save; the weekly or monthly payments have been a lesson to most of them. The instalment system has been expanded ever since the war, and generally 15 per cent. is put on the value where goods are sold this way. Consequently even if some crisis does occur, the loss that may arise to the seller will have been made good during the long period since the system has been in force. Statistics show that the losses incurred have so far not been greater than 3 per cent. There are, of course, finance corporations which specialize in insuring the seller.

It may be that the pledging in advance of most of the weekly wages has made the American worker more docile than in Europe; the ardent desire to earn more money is partly due to the fact that the worker, and particularly his wife and family, have through the instalment system tasted the luxuries of life, and in order to continue enjoying them a higher wage-income becomes necessary, and that can be obtained only through concentrated work.

## FALLACIES IN COTTON MILL COSTINGS.

The Cotton Textile Institute, Inc., New York, has devoted in the past three years of its existence its major attention to introducing exact costing methods in the American cotton mills, and has for this purpose established a specialized department under the direction of one of the ablest "cost engineers" in the country, Mr. Geo. W. Duncan, as it was generally recognized that to a great extent the trouble of underselling was due to an ignorance of the exact or real cost on the part of the mill. As this same cause is undoubtedly existing, not only in U.S.A. but in every cotton-manufacturing country, we have extracted the following most instructive pages from a pamphlet recently published by the Cotton Textile Institute, of 320, Broadway, New York, under the title, "An Outline of Bases to be used in Predetermining Costs for Guidance as to Sale Policies." The entire booklet is highly elucidating, and shows what valuable work the costing department of this Institute is carrying on. Undoubtedly firms particularly interested in this question of costings will be able to obtain a full copy by applying to the Institute.

### ESSENTIAL TO ASSIGN COSTS ACCURATELY TO DIFFERENT PRODUCTS.

The object of predetermining costs is to afford the management a guide as to sales policy. Since what the management sells is specific fabrics or yarns, each at its own price, it is essential to assign the various costs so as to reflect accurately the cost of each fabric or yarn, and in due relationship to the costs of other fabrics or yarns. Unless this is done, the management is in the dark as to the profitableness or unprofitableness of different products. It would be possible for a mill to include in its costs every sort of cost dictated by correct principles, and in the correct amount, and yet by assigning these costs to different products by incorrect methods the mill might arrive at a substantially incorrect cost as to every product it made. A few striking examples are here cited as illustrative of serious errors of this character, and it is well to emphasize the fact that such errors are by no means infrequent:

(1) A practice still resorted to in some instances is to divide the total expenditures by the actual production in pounds and to assume that this represents the cost per pound; and then to divide this cost per pound by

the yards per pound for a particular fabric and to assume that the result represents the cost per yard for that fabric. This method, of course, ignores every differentiating circumstance in the business, whereas, at practically every stage of manufacture, the production of every distinct yarn number or construction of cloth involves differences in relative expenditure of labour and overhead. Hence this method is a complete negation of the theory of cost finding except when a mill confines itself exclusively and invariably to the making for sale of a single yarn number or to the weaving of a single construction of cloth.

(2) Other practices, still employed quite frequently, are equally as untrustworthy as are the "average per pound" and "average per yard" methods. One of these is to figure the average yarn number for the mill and assume that the average cost per pound is the cost of those products made from this average yarn number, and then to assume that the cost of a product whose yarn numbers have a different average from the average yarn number for the mill has a certain mathematical relationship to this assumed cost of the average yarn number for the mill. For example, if a mill estimates that it costs on the average  $7\frac{1}{2}$  cents to make a product containing 10's yarn, then it should cost twice that to make a product containing 20's yarn, etc. Another mill may estimate that, within certain ranges, if the cost of a product containing its average yarn number is so many cents per pound, then for some other product made from yarn which differs from the average number, one-quarter cent per pound should be added for each increase in the count of yarns, or subtracted for each decrease in the count of yarns. These are "rule-of-thumb" methods, which disregard the facts that actually control the relative costs of different numbers or constructions, and no mill should continue to employ them.

Attention is called to the following examples, which fairly suggest the extent of error in the results derived from these rule-of-thumb methods.

In the first case: Assume the charge per spindle per week for overhead amounts to 3.75 cents and the production per spindle per week on 10's and 20's is 4.74 lbs. and 1.93 lbs. respectively. The cost, therefore, would be 79 cents per pound ( $3.75 \div 4.74$ ) on the lower-count yarn. On the average yarn number basis the cost would be 1.58 cents per pound for the higher count, whereas in fact the cost would be 1.94 cents per pound ( $3.75 : 1.93$ ) on 20's yarn, or an increase in cost of about 23 per cent. over the figure indicated on the average number basis.

In the second case: Take 40-in.  $48 \times 48$  2.85 sheeting, which may be made from 15's average yarn, and 31-in.  $48 \times 48$  5.00 sheeting, which may be made from 20's yarn. On the assumption of a variation of  $\frac{1}{4}$  cent for each variation of one yarn number, and there being a difference of five numbers between the average yarns, the result of this method would be that if, exclusive of cotton, the first fabric cost 10.73 cents per pound, the second fabric would cost 11.98 cents per pound. But, if a careful survey is made of costs of the typical mill selected for working out this example, and the costs of those two fabrics are computed on a proper basis, it will be found that if it cost 10.73 cents to make the 2.85 construction, then it will cost 14.64 cents to make the 5.00 construction, or an increase in cost of about 22 per cent. over the figure indicated on the  $\frac{1}{4}$  cent per pound differential per average yarn number.

(3) Many mills refrain from the sweeping "average" methods described above in paragraphs (1) and (2), and go to the extent of properly dividing the pay-roll among the different departments, but then proceed to nullify in large part even this step toward accuracy by failing to assign the pay-roll costs in a particular department in accordance with the actual relative costs therein. For example, the labour costs in the card room may be figured as an average cost per pound for the card room, disregarding the fact that two or more hank rovings may be made, each of which has a separate cost. Again, the labour costs in the spinning room may not be computed separately, as they should be, for warp yarn and for weft yarn. Again, the indirect labour costs in the weave room (overseer, loom tacklers, oilers, etc.) may be figured at an average cost per loom per week for all looms, notwithstanding numerous distinguishing factors, such as narrow and wide looms, common automatic looms and the more complex box looms with various attachments. But in addition to failing to "follow through" the proper assignment of labour costs in the various departments so as to reflect actual differences in

costs in different processes in each department, these mills are likely to fail entirely to make any sound assignment of their overhead costs.

(4) The inadequate and inaccurate treatment of overhead elements is widespread and causes more variance and error in costs than any other single factor. The following erroneous methods are frequently encountered :—

- A. Overhead charged uniformly per pound.
- B. Overhead charged uniformly per spindle.
- C. Overhead charged uniformly per loom.
- D. Overhead charged as a percentage of labour cost.
- E. Overhead charged by assuming the mill to be "running on only one style."

A—Charging overhead "uniformly per pound" involves the same unsoundness in principle as charging all costs on the "average per pound" basis above referred to. Some mills maintain that the total expenditures must be got back by the sale of product, and, so long as the total overhead is applied, it is immaterial as to what the particular distribution is. But this argument completely disregards the fundamental purpose of cost calculating, which is to ascertain as accurately as practicable the relative cost of different sorts of products. Inevitably any "average per pound" method of distributing overhead will result in burdening some sorts of product too much and other sorts too little, and hence will serve as a continuing obstruction to the development of sound sales policies. For example, the cost per unit of product from any machine is dependent upon the rate of production from the machine. If a mill is making both 20/1 and 30/1 yarn, it will on the 20's get more pounds per spindle and a lower cost per pound. Even when a mill makes one warp yarn and one weft yarn it usually makes fabrics which differ in the sley, pick or width. The result is that using the same yarns they get different production from the same loom on various fabrics, and there is a resulting difference in the cost per pound for weaving. Any calculation which averages the results on different constructions ignores all such differences and is certain to be misleading.

B—C—While the basis of figuring "overhead as a uniform charge per spindle or per loom" is better than treating this burden as a uniform charge per pound of cloth, it too will give misleading costs. To make the distribution of all overhead solely on the basis of spindles is to assume that costs in the weaving department, for example, vary as to the many different sorts of fabrics produced according to precisely the same variance found in the spinning department, whereas this is obviously not the case. Similarly if the total overhead is charged uniformly per loom the results are also misleading, since this assumes that the costs in the carding and spinning departments are distributable in precisely the same ratios as the costs in the weaving department, whereas the burden chargeable to the yarn departments may not have any just relationship to a loom, because on the same type of loom it is quite possible, with cloths requiring approximately the same yarns, to weave one and a half to two times as many yards of a certain construction as of a different construction. In such instances one fabric would require considerably more preliminary machinery than the other, and no correct allowance is made for this if the overhead is apportioned only according to looms. If the total overhead charge is distributed uniformly per spindle or per loom the practical results are that the costs of some cloths are figured too low and others are figured too high.

D—Perhaps the most convenient as well as inaccurate and misleading basis for overhead distribution is that of "overhead charged as a percentage of labour cost." Such items as the value of buildings and machinery, power required, general supplies, salaries, insurance, taxes, etc., for departments bear no uniform relationship to the labour employed therein. Consider, for example, a weave room which contains both plain and automatic looms. The initial investment for an automatic loom is greater than for a plain loom and an automatic loom requires more supplies, power and floor space than a plain loom, and it should, therefore, absorb more overhead. Yet the total labour cost on the automatic loom will be much less than on a plain loom, so that if the assignment of the overhead is made on the percentage of labour cost basis the result will be that the amount of overhead assigned to an automatic loom will be much less than the amount of overhead assigned to a plain loom, whereas the fact would be just the reverse.

E—Another basis which is used to assign the overhead cost to yarns and cloths is that of "assuming the mill to be running on only one style." That is, the assumption is made, in order to ascertain the cost for making a particular product, that the mill runs exclusively on that product, and calculations are made accordingly. Then, in order to arrive at an estimate of the cost of some other product the assumption is made that the mill is run exclusively on the latter, and computations are made on that theory. Of course, such a method completely disregards the realities of the case and arbitrarily assumes a fictitious condition which not only does not exist but is not likely to exist. If such a condition should actually come about, it would probably result in throwing the mill out of balance. As an illustration, if a mill contained sufficient machinery to be balanced if a 4.00 yard print cloth, it would become unbalanced if a 4.10 broadcloth were put on the looms, because the spinning department could not produce sufficient yarn to keep all the looms running. On the other hand, if 4.73 weft sateens were put on the looms the spinning production would be in excess of the consumption of yarns by the looms, with the result that carding and spinning machinery would be shut down. If the mill were actually running on a single product, and if the result of that practice were to involve the stoppage of machinery not required therefor, a true ascertainment of costs would necessitate charging to that product the cost of the machinery-idleness which would be involved if the entire mill ran exclusively on that product. But this concession to accuracy is not made by those who resort to this arbitrary and fictitious method. The only sound method is to deal with the facts as they are and to assign the cost accordingly.

#### ASSIGNMENT OF OVERHEAD.

Since inadequate and inaccurate treatment of overhead elements is a fault common to many mills, a proper distribution of these various items to the departments of a mill for the purpose of calculating costs for sales-policies is given below.

Overhead Items	Basis of Distribution
Starch and Size	To Slashing Department
Roll Covering	To Card. & Spinning Departments, per cent. consumed.
Fuel and Purchased Power	To Power Departments <sup>1</sup>
General Supplies	Records of Supplies Consumed <sup>2</sup>
General Repairs	Records of Repair Work Done <sup>2</sup>
Drayage	Records of Work Done <sup>2</sup>
Office Expense	} Separate between miscellaneous, <sup>2</sup> Selling, <sup>2</sup> and Material Overhead
Office and Executive Salaries	
Taxes	Value of Land, Bldgs. & Machinery
Insurance - Fire	Value of Buildings and Machinery
Insurance - Liability	Per cent. of Pay-roll of Prod. Depts.
Insurance - Group	Per cent. of Pay-roll of Prod. Depts.
Insurance - Boiler	To Power Department
Insurance - Flywheel	To Power Department
Insurance - Use and Occupancy	Miscellaneous Overhead <sup>2</sup>
Depreciation - Buildings	Value of Buildings
Depreciation - Machinery	Value of Machinery
Interest - Plant and Equipment	Value of Land, Bldgs. & Machinery
Interest--Materials	Applied to Raw Material Cost
Interest--Stock in Process	Value of Stock in Process
Interest--Finished Goods.	Selling Overhead
Interest--Supplies	Records of Supplied Consumed
Interest--Cash	Miscellaneous Overhead
Licences, Donations, etc.	Miscellaneous Overhead
Legal Expense	Miscellaneous Overhead
<sup>1</sup> Power Department for Power	Per cent. of Horse-power
Power Department for Heat and Lights	Per cent. of Floor Areas, exclusive of Storehouses
Power Department for Steam	Per cent. of Steam Consumed
Repair Shop Charges	Records of Repair Work Done
<sup>3</sup> Miscellaneous Overhead	Per cent. of Pay-roll of Prod. Depts.
<sup>4</sup> Selling Overhead	Applied to the Product
<sup>5</sup> Material Overhead Expense	Applied to Raw Material Cost.

<sup>2</sup> NOTE.—If records are not kept, experience and knowledge of local conditions must determine the treatment of these items.

## RECONCILIATION OF PREDETERMINED COSTS

The total predetermined cost (the predetermined cost over raw materials per pound or per yard of each product multiplied by the pounds or yards produced of the respective product during a given period) should be reconciled periodically with the accounting records of the mill. Under normal conditions, quarterly reconciliations should suffice.

A simple reconciliation of predetermined costs for a given quarter is shown below :-

Style No of products made,	Pounds made during quarter	Predetermined costs over raw materials per lb.	Total predetermined cost over raw materials.
63 ...	1,545	@ \$ 2616	\$ 404.17
58 ...	9,027	@ -3218	2,904.89
68 ...	44,192	@ -3038	13,425.53
89 ...	9,796	@ -2968	2,907.45
98 ...	142,816	@ 3139	44,829.94
39 ...	255,511	@ -3272	83,603.20
69 ...	169,644	@ -3030	51,402.13
100 ...	137,279	@ -2773	38,067.47
Total	<u>769,810</u>	<u>\$-3086</u>	<u>\$237,544.78</u>

The total, \$237,544.78, represents the amount of labour and overhead absorbed by predetermined costs to manufacture the actual pounds produced during the given quarter. But the pounds produced may have varied from normal production and prices for fuel, supplies, etc., and the amounts for taxes, insurance, salaries, etc., may have changed also from the amounts included in the predetermined budget so that it becomes necessary to compare (1) the total absorbed costs (as above shown) with the total actual pay-roll for the quarter, plus the total overhead from the predetermined cost budget, and (2) if the variation between the totals of (1) exceeds 1½ per cent., then compare the details (each item) in the predetermined cost budget with corresponding items on the books of account in order to determine where the variation lies or where the budget should be adjusted. For example, in the reconciliation referred to above, this is done as follows :--

(1) Total actual pay-roll for quarter ... = \$137,713.02  
 Quarterly overhead from predetermined cost budget = 97,693.86

Total ... = \$235,406.88

\$237,544.78 - \$235,406.88 = \$2,137.90.

\$ 2,137.90 ÷ \$237,544.78 = .009 per cent.

Costs thus arrived at were, therefore 9/10 of 1 per cent. lower than the predetermined costs during the above period. Since the variation would be less than 1½ per cent., it would not be considered necessary to make a detailed comparison of all the items.

NOTE In the above example it is presupposed that the predetermined budget will be made to reflect promptly any substantial changes in expenditures for overhead.

Pounds of Stock in Process at the beginning and end of the above period remained about the same, so that no adjustment on this account was necessary.

In the reconciliation of predetermined costs with the costs shown by the books of account the cost of raw materials must, of course, be omitted, since the books are based on the actual price of raw materials, while the predetermined costs should be used in connection with the replacement cost of raw materials at the time of sale.\*

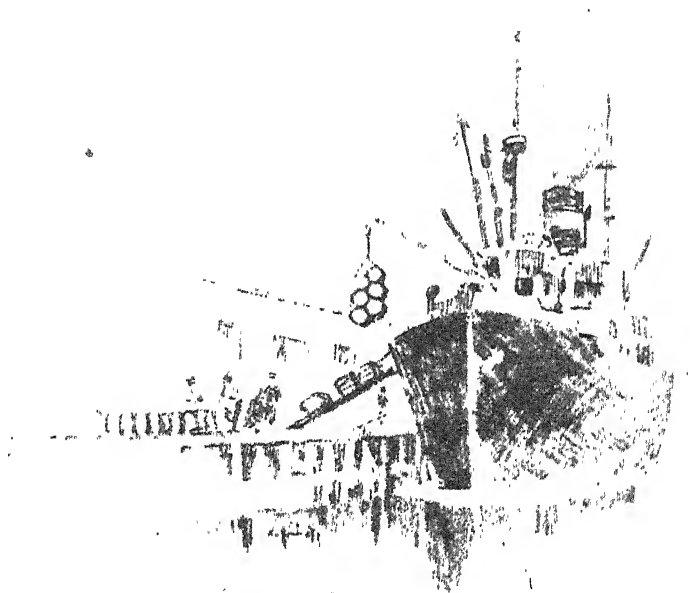
\* The following point deserves consideration --

Mills seldom keep their books so as to show separately the profit or loss from transactions in raw materials on the one hand and profit or loss from manufacturing operations on the other. Hence a mill may show an ultimate profit due entirely to profit in the purchase of cotton, and even in spite of a manufacturing loss. On the other hand, a mill may show a profit due entirely to manufacturing operations, and even in spite of a loss on cotton. It is a question worthy of serious consideration whether it would not throw extremely valuable light on the efficiency of raw material transactions, on the one hand, and manufacturing operations on the other, and also promote sounder merchandising policies, to keep records separating these two matters so as to show with clearness the profit or loss, whichever it may be, each independently of the other. Some mills accomplish this result by entering on all orders for product sold the price of cotton used in the quotation at the time of sale, and then the actual price of cotton bought to fill the orders when fixed is also entered on each order. By such practice a mill may accurately and conveniently determine the profit or loss on orders, so far as raw material transactions are concerned.

## GENERAL

*Standard Weight.*— Usually, in the sale of cloth, payment is received by the mill on standard weights only. If the cloth actually weighs more than the standard weight the extra material in the cloth is given away by the mill. If a mill has determined the cost per pound of finished product this figure should be divided by the actual yards per pound to get the cost per yard. Many mills make the mistake of dividing by the standard yards per pound, even though their goods are regularly made heavier than standard, and thereby understate their cost per yard. As to price also mills frequently make the mistake of basing their calculation of selling price per pound by multiplying the price per yard by the standard weight, whereas they should use the actual weight when the goods are heavy. In the interest of sound practice and uniformity, it is believed that each mill will find it to its advantage to adopt the above methods as to figuring cost per yard and price or return per pound unless they are able to maintain their actual weights very close to standard weights.

*Profit or Loss per Spindle and per Loom.* While the predetermined profit or loss per pound or per yard is necessary and useful information, it is also advisable to carry the calculation still further and show the profit or loss per spindle and per loom per week, because these further figures give additional light on the situation, inasmuch as yarns and fabrics are produced at varying rates.



# RAW COTTON.

## GOVERNMENT CROP REPORTS.

Last year's final figure did not vary very much from the first August forecast, nor is it likely that this year's August figure will be much different from the final one, but that does not mean to say that the Crop Reporting Board is able to say as early as August what the final crop is likely to be, and I am sure they do not claim such powers. If one refers to the forecast of August, 1927, separately for each State, and compares these individual State figures with the final figure, considerable differences are apparent. It just happened that what one State lost, the others made more.

The English Federation of Master Cotton Spinners' Associations addressed to the Paris Committee Meeting (March, 1928), a letter pointing out that owing to the frequency of crop reports emanating from the U.S. Department of Agriculture disturbance to trade was created, and that gambling in cotton was fostered.

The following resolution was then adopted by the International Committee :—

“ This meeting of the International Committee expresses unanimously the opinion that the publication of the monthly reports on the condition and production of the United States cotton crop by the Department of Agriculture in Washington, D.C., has been detrimental to steady trade, and has caused excessive speculation. This meeting therefore respectfully requests the U.S.A. cotton-manufacturing interests, as well as the cotton farmers and cotton merchants concerned, to exercise their influence that legislation be modified so that only one condition report of the crop be published during the growing season, preferably in October of each year.”

The Secretary was requested to submit this resolution to the Cotton Textile Institute, in New York, and to other interested American organizations.

Both Czecho-Slovakia and Finland, on receiving the minutes of the Paris meeting, stated that they could not endorse the view expressed in that resolution.

None of the American exchanges or cotton manufacturers' associations in America, to whom this resolution was sent, took the matter up, but one Senator in the South gave notice of a Bill to the effect that the Government, or anybody else, be prevented from making any crop report, and that it shall be a misdemeanour to use the mail for conveying these. Nothing has, so far, come of this Bill, nor is there any likelihood of it going further.

The Crop Reporting Board has gained more experience, and with it more confidence in American cotton-growing and merchanting circles. The following questionnaires used for the latest October forecast show the questions asked :—

QUESTIONNAIRE No. 1] UNITED STATES DEPARTMENT OF AGRICULTURE [October 1, 1928]  
BUREAU OF AGRICULTURAL ECONOMICS—DIVISION OF CROP AND LIVESTOCK ESTIMATES, WASHINGTON, D.C.

To be mailed promptly October 1, 1928, in the enclosed penalty envelope, WHICH REQUIRES NO POSTAGE

OCTOBER 1 COTTON SCHEDULE

Name .....

Post Office .....

Country in which I live .....

R. D. No. .... State .....

Please write plainly your name and address above; and read carefully the instructions on the other side before making report

RETURN SCHEDULE EVEN THOUGH YOU CAN REPORT FOR ONLY ONE OR TWO ITEMS

REPORT FOR YOUR IMMEDIATE LOCALITY

1	2	3	4	5	6	7	REMARKS
CONDITION of cotton in 1928 compared with year's condition, but with a NORMAL condition of growth and vitality, giving promise of a full yield per acre, represented by 100. (See instruction 2.)	How many bolls per plant safe to date this year (in- clude those already picked)?	Probable average yield in your locality this season in pounds of seed cotton per acre?	Probable average yield in your locality this season in pounds of lint cotton per acre?	What per cent of the crop in your locality has been ginned to date?	What per cent of the cotton crop in your locality has been picked to date?	Boll weevils considering complete infestation as usual. How would you estimate the present infesta- tion in your locality? (See instruction 3.)	
Per cent.	Number	Pounds	Pounds	Per cent	Per cent.	Per cent.	
							OVER

On the reverse side of this questionnaire is printed:—

INSTRUCTIONS TO REPORTERS

MAIL SCHEDULE PROMPTLY OCTOBER 1, 1928

WASHINGTON, D. C., 1928

1. This schedule should be mailed on the date indicated. The inclosed penalty envelope, which requires no postage, is to be used for the return of this schedule

CONDITION OF COTTON

A "normal" or "full" yield represented by 100 per cent, is that yield per acre which is expected when the season is favourable and insects and diseases have caused little or no damage. A "bad" or "low per cent" condition of cotton is that condition of growth and vitality and relative freedom from insects and diseases, which is expected in a general favourable season. While the "normal" (100 per cent. yield or condition) is higher than that of ordinary seasons, it may be exceeded by the bumper yield, or very high condition, of an exceptionally favourable year. In estimating the condition of the cotton crop, a reporter should take into consideration not only the growth and appearance of the plant, but every factor within his knowledge which influences the probable yield per acre. In estimating condition, quality should not be taken into consideration except in so far as it affects the quantity that will be actually harvested. If the present condition is 10 per cent, above the normal, the answer should be filled in as 110; if 5 per cent below, it should be reported as 95, etc. (See item 1.)

3. No reply on question concerning weevils is expected in nonweevil territory. (See item 7.)

Respectfully,

W. F. CALLANDER,

Chairman, Crop Reporting Board.

## [QUESTIONNAIRE No. 2]

The ginner is requested by the Agricultural Statistician in each State to answer the following questions:—

1. How many bales of cotton have you ginned this season prior to October 1 ?
2. About how many MORE bales do you expect to gin from now to the end of the season ?
3. How many bales did you gin last season ?

## [QUESTIONNAIRE No. 3]

[OCTOBER 1, 1928]

UNITED STATES DEPARTMENT OF AGRICULTURE  
BUREAU OF AGRICULTURAL ECONOMICS

Division of Crop and Livestock Estimates, Washington, D. C.

## SPECIAL COTTON COUNTS

To Special Cotton Reporters :

This is one of the series of reports which you volunteered to fill out in order to assist the Department in improving its cotton forecasts. Please make the counts promptly and return this card in the enclosed return envelope, *which requires no postage*.

Very truly yours,

W. F. CALLANDER,  
Chairman, Crop Reporting Board.

Name .....

Post Office .....

County .....

State .....

On the fifteen-foot strip of cotton which you marked off of the purpose, make the following counts

1. How many bolls are as large as or larger than a 25-cent piece ? (Include any already picked) Measured off six feet of the fifteen-foot strip and report.

2. How many bolls smaller in size than a 25-cent. piece ?

From an adjoining row, pick 10 grown bolls (open and green taken at random), and examine them to determine :

3. How many have been punctured by boll-weevil ? From an adjoining row, pick 10 bolls smaller in size than a 25-cent. piece, cut them open and report :

4. How many have been punctured by boll-weevil ? From an adjoining row, pick 10 *locks* of seed cotton and report :

5. How many seed in all ?

Pick enough open bolls of cotton to balance the small scales sent to you. Do not select largest or best filled bolls. Take open bolls as they come—large, small, full locked, or partly locked.

6. How many bolls of seed cotton needed to weigh  $\frac{1}{2}$  lb. ?

If we study the first enquiry form, we find that questions and explanations to guide in the answering of them are as intricate and involved as an Income Tax return. The explanation as to "100 per cent. condition of cotton" is very vague, and one must pity any farmer who tries to answer this question conscientiously on the basis of this explanation. One must realize that some 20,000 farmers, who generally do not possess a high-school education,

have to answer in the sense of this involved explanation; they are men not versed in percentage calculations. The resulting average of condition percentage is the all-important factor in arriving at the indicated production. All the other six questions are also bound to result in vague answers, particularly No. 7, relating to weevil percentage.

The second questionnaire is right, as it confines itself to facts in two questions, and the estimate asked for in the other one should be easy to answer.

Questionnaire No. 3 is excellent—it is quite on the lines mentioned in my last year's report. If the answers to these questions were published for the last few years, the outsiders interested in crop reports would learn a great deal that might become useful in assessing the likely crop in future seasons.

This year the Crop Reporting Board has changed its methods in so far that it took abandonment at once into consideration (not December 1, as formerly), and that it took 10 years' average weevil damage at once into consideration. Both steps are perfectly proper, but as the public is now engaged on the guessing of the Government figure, not guessing the crop, people got wrong in their August calculations, as they did not know sufficiently in advance that these changes were being contemplated.

Whatever criticism I make, I wish it fully understood that no commercial organization and no individual could possibly undertake the work of forecasting the cotton crop as well as the Crop Reporting Board of the Department of Agriculture, and I further believe that the Board, as such, aims to give an honest result, as impartially as possible. My severe criticism in 1924 related mostly to defects in the management of the meeting, which, I am told, have now disappeared.

Nevertheless, the task of the Crop Reporting Board as early as August, probably even September, is an impossible one, as real tangible facts arise only after the ginning of, say, a third of the crop, which is October 1. It is only when the farmer fills his box-cart with the usual quantity of seed cotton, and finds that after ginning it has given, say, 470 lbs., instead of nearer 480 lbs., whether the bolls have been full or less full of lint. It was this falling-off in weight of the bale early in September, 1928, which was the true indication of the going back of the crop, which on October 8 was reduced by the Board from 14,439,000 bales to 13,993,000.

Whilst I still believe that it would be better to have only one forecast by the Crop Reporting Board, viz., October 1, along with the fortnightly ginning figures, which give actual facts, and not surmises, I fear we are powerless to bring this change about. We are not American citizens, and have, therefore, no direct influence. In America there are, perhaps, several million people who speculate regularly on these forecasts of the Crop Reporting Board, and they would not wish to see them diminished in number, rather increased. Whatever we may say against gambling, careful speculation in cotton is not much else than a well thought-out investment, by means of which the true world's value of cotton is finally

established. What is the difference whether a man invests his money in stocks with a view to capital increase or he buys cotton?

Our only means of bringing about a reduction in the number of Government crop forecasts seems to me by education, such as we are doing in the THE INTERNATIONAL COTTON BULLETIN.

#### OUR COTTON CROP REPORT.

The concern of everybody engaged in cotton nowadays is not to guess the final crop, but to come as near as possible to the figure upon which the Crop Reporting Board may decide every month during the growing season, and to interpret what influence such figures are likely to have on the market.

I do not think the members of this organization can find fault with the advance indications on both these points, forwarded by letter and cable ten days prior to the Government Report of September 8. On September 1 I cabled that my crop information pointed to about 14½ million bales, and that there would be a short dip in price during the big movement.

On August 23, which reached the associations several days before the publication of the Government report, I gave the following detailed figures per State:—

	August 23 Bales	Against the Government September 8 Figures Bales.
Virginia .. ...	28,000	46,000
North Carolina .. ...	1,000,000	970,000
South Carolina .. ...	900,000	890,000
Georgia .. ...	1,100,000	1,100,000
Florida .. ...	25,000	19,000
Missouri .. ...	132,000	165,000
Tennessee .. ...	372,000	441,000
Alabama .. ...	900,000	970,000
Mississippi .. ...	1,400,000	1,250,000
Louisiana .. ...	575,000	560,000
Texas .. ...	5,200,000	5,100,000
Oklahoma .. ...	1,300,000	1,306,000
Arkansas .. ...	1,250,000	1,250,000
New Mexico .. ...	82,000	80,000
Arizona .. ...	133,000	133,000
California .. ...	157,000	149,000
Sundries .. ...	10,000	10,000
	14,564,000	14,439,000
	L. California	95,000
		14,534,000

Whilst at the time of sending this detailed forecast (August 23), October futures were quoted as follows:—

New York  
18.60 cents

New Orleans  
17.86 cents

Chicago  
17.89 cents

these quotations had undergone the following reductions by the end of September:—

New York	New Orleans	Chicago
17.31 cents	16.51 cents	16.80 cents,

thus bearing out the anticipated dip in price.

Since my return to Europe I advised our associations, on September 27, that the information which I had received pointed to a reduction of 400,000 bales in the crop forecast of October 8, and that the figure would be about 14,000,000 bales. A special friend of mine cabled the same figure on October 1, and on October 5 I sent the following circular:—

“ I have received since my return various estimates, which range from 13,600,000 to 14,751,000, the average of which is 13,988,000. Mr. Fossick, who has on the last two monthly returns been very near the mark, gives his figure as

13,993,000.

“ I must leave it to you to come to your own conclusions.”

You will remember that the figure published on October 8 by the Crop Reporting Board was 13,993,000, and that Mr. Fossick had the singular fortune of hitting upon the exact figure. As indicated above, our average worked out to 13,988,000, which is only 5,000 bales lower than the Government figure.

18½ cents to 19 cents is regarded in America as a fair average for a crop such as we are likely to have, but, of course, there will be fluctuations, generally 2 to 2½ cents up and down from that figure sometime in the season.

The Government figure of October 8, 13,993,000, may be regarded as approximately indicating the final crop, provided the frost does not come to North-West Texas before the usual date, about November 7; once it arrived as early as October 21. As the crop there is particularly late, and as that part has had this year an exceptional quantity of rain, the bolls are very sappy and early frost would have a more serious effect than usual. After a dry frost they use in these parts the sled, but a wet freeze makes the bolls spongy, and the cotton is then only good for bolles, i.e., fibres of hardly any strength. The cleaning machinery at the gins has been so much perfected that they can handle sledded cotton in such a way that few experts can distinguish sledded cotton from hand-picked cotton. A late open winter may add a quarter of a million to the above figure.

#### STAPLE PREMIUM.

Owing to the fact that many tyre makers have gone from 1½ ins. and 1¾ ins. (American standard lengths) cotton to 1½ ins. and full 1 in., the latter lengths are proportionately at a higher premium than 1½ ins. Long-staple cottons are cheap, and from what I could learn the tendency is still further downwards. The Mississippi Delta has about 100,000 bales more this year of that type than last. The flood has deposited a layer of rich alluvial soil, and the crops in last year's flooded parts have done very well. The *model plantation at Scott, Miss.*, belonging almost

exclusively to the Fine Cotton Spinners and Doublers' Association at Manchester, England, which suffered last year to such an extent that only 42 bales were harvested, has this year a prospect of about 9,000 bales from not quite 13,000 acres. The crop is the finest I have seen on my peregrinations, and great credit is due to the organization which in so short a time repaired the very serious damage to the houses of the tenants (not a single house escaped flood damage), brought back enough coloured population to bring almost 13,000 acres under cultivation, and has, besides the 9,000 bales cotton, enough feed stuff to supply its own requirements, and can sell 400 tons to outsiders. Whilst in normal years about 80 per cent. of their fields have to be poisoned with calcium arsenic, this year they had to poison only 25 per cent., thus showing a very small weevil attack. The manager of this estate, which is known as Delta Pine and Land Company, offices at Memphis, Tenn., expressed to me his desire to sell cotton from the plantation to the spinning mills. The cotton produced is full  $1\frac{1}{8}$  ins. to  $1\frac{3}{16}$  ins. (American standard), and I can confidently recommend spinners to enter into negotiations with this firm. There are, in addition to the 9,000 bales from Scott, another 7,000 bales of the same or similar cotton which the manager of the Delta and Pine Land Company (Mr. Oscar Johnston) is able to sell.

In former years North Texas (round Paris) used to give excellent staple cotton, but I fear that the inroads which have been made there by planting Half-and-Half Cotton ( $\frac{7}{8}$  in. to  $1\frac{1}{8}$  in.), which yields much more weight than the staple cotton, has spoilt that part for good.

Last year there were hardly any low-grade cottons to be had; but this year the Atlantic States have some, and if we get rain or early frost in the Western States there will be more.

## COTTON STATISTICS.

### CARRY-OVER.

The International Federation does not venture on calculating the carry-over figure, it leaves this debatable matter to others. Garside, whose Cotton Service is being more and more appreciated, particularly in U.S.A., estimated that on August 1, 1928, the carry-over was 5,082,000 bales. Col. Hester's figure was 5,298,000, and Professor Todd's 5,150,000. The six years' average is 4,725,000 bales. Garside's carry-over figures for the last six years were as follows:—1923-24 = 3,318,000; 1924-25 = 2,711,000; 1925-26 = 3,380,000; 1926-27 = 5,501,000; 1927-28 = 7,758,000; 1928-29 = 5,082,000.

### SUPPLY AND CONSUMPTION.

The estimates of the Crop Reporting Board, Washington, issued so far give the following results:—

	Oct. 1	Sept 1	Aug. 1
Estimated crop (bales) ...	13,993,000	14,439,000	14,291,000
Condition, per cent. ...	54.4	60.3	67.9
Yield per acre ...	149 1 lbs.	153.9 lbs.	152.2 lbs.

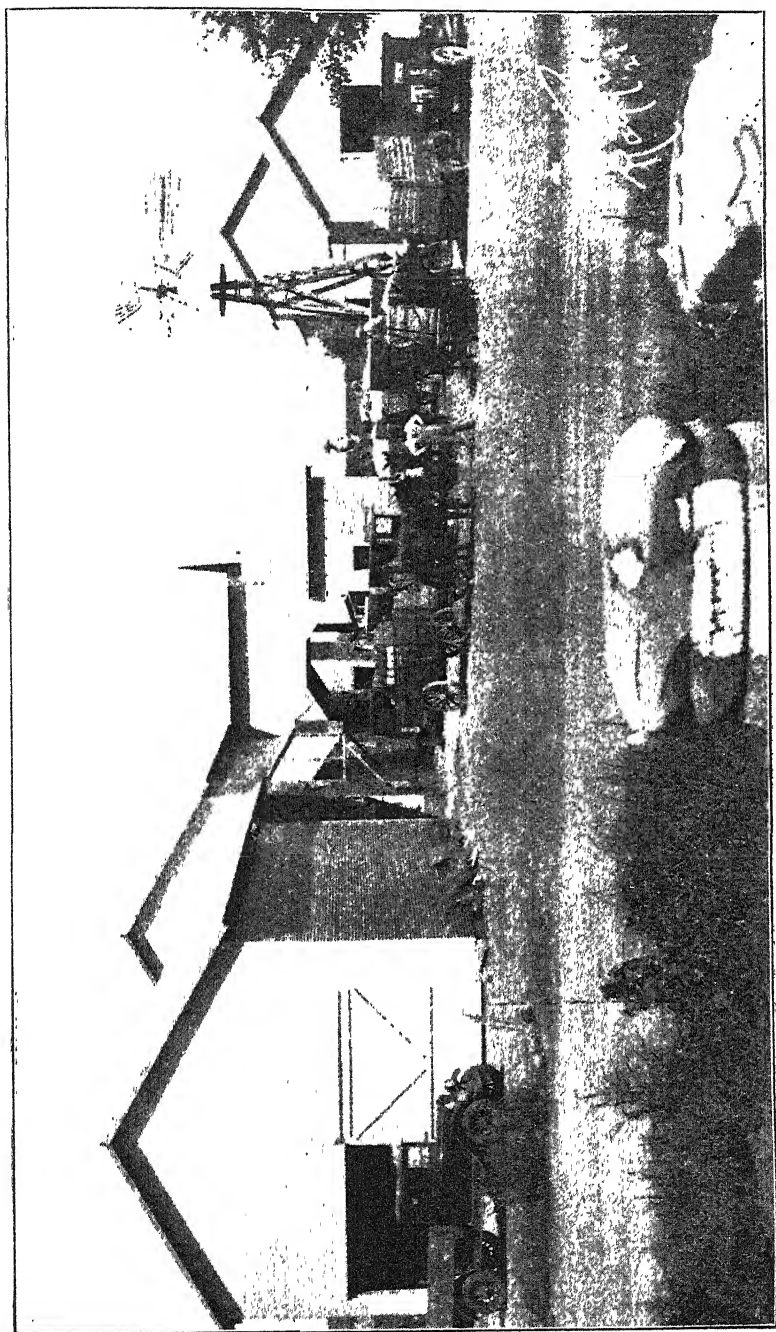
If the frost arrives at a normal time we shall probably have a crop slightly larger than the October figure, but if the North-west of Texas, which is every season on the brink of failure or success owing to its geographical position, does not come up to anticipated expectations, we may have a little less than 14 million bales. Adding to this figure the carry-over of about 5,200,000 we shall have 19,200,000 bales as the total supply. That is more than ample, as the world's total consumption of American cotton, according to our International figures, for the past season was 15,407,000 (Garside made it 15,502,000). In U.S.A., owing to unfavourable business, caused partly through the Presidential Elections, consumption has fallen off very materially and what might be called organized short time was being worked for the first time in the majority of the United States mills, namely one week in August and one week in September. The August consumption of the United States mills was 478,000 against 605,000 in the previous year. A similar reduction is likely for September, and also for October; the consumption of October-November is almost certain to be less than in the previous year. If business from December for the rest of the seven months of the season in U.S.A. becomes active, as is generally anticipated, we shall have a reduction in America's consumption of at least half a million bales. From what I can gather Europe and Asia (whilst some countries will lose, others will gain) are not anticipated to show a great change against last year's consumption figure. It follows therefore that we can reckon with a consumption for 1928-29 of slightly less than 15 million bales, which would leave a carry-over similar to last year's.

## CO-OPERATIVE COTTON GROWERS' ASSOCIATIONS.

The Co-operative Cotton Growers' Associations of the United States have sold the following quantities of cotton for the last seven years :—

				Bales.	Per cent. of Total Crop
1921-22	...	...	...	352,226	4.4
1922-23	...	...	...	763,686	7.8
1923-24	...	...	...	928,562	9.2
1924-25	...	...	...	1,096,309	8.0
1925-26	...	...	...	1,471,508	9.1
1926-27	...	...	...	1,231,824	6.7
1927-28	...	...	...	836,510	6.5

The Co-operatives set out with the idea of selling every month a certain portion of the crop in order to obtain for their members the average price of the season, but evidently this system has not worked satisfactorily. Past events have shown that they have sold the cotton too cheap. Contracts have now been made according to which the individual member may indicate when or at what price his cotton should be sold. The falling-off in the quantity of cotton sold during the last two years is partly to be attributed to the introduction of this new contract, the general adoption of which always takes some time. Though the Co-operative Associations have not sold as large quantities during the two years past, yet the



Texas Farm Bureau Gin Co. of Merkel (Central West Texas)

movement is not flagging, and efforts are being made, under the guidance of the Department of Agriculture, in order to give more force to it. At the meeting held on the 4th and 5th September in Memphis, delegates from all parts of the country reviewed the position of the Co-operative Associations, discussed the defects and decided upon new measures to strengthen the movement. It may be said that since the first year of their existence the expenses per bale handled by the Co-operatives have been reduced by 50 per cent.

Several of the Co-operative Associations, notably Texas, Oklahoma, have undertaken the ginning of cotton for their members. In this way they are producing a better quality of cotton by running the gins fast or slow, according to the length of fibre, which is never done in the public ginneries, and, moreover, they are able to control in this way that a certain district be supplied only with one variety of cotton-seed. The Texas organization has at present 18 ginning factories, but next year they hope to have about 30.

The pool system, adopted by all the Co-operative Associations, insures to the spinner uniform deliveries of cotton throughout the season. All the cotton of one and the same character and quality is put into one huge pool, and if a spinner buys at the beginning of the season, say, from pool 101, he will be quite sure that at any time during the season a repeat order from pool 101 will bring the identical cotton as his first delivery. That is an enormous advantage to the spinner, and a recommendation to do business with the Co-operative Associations.

### ROUND BALES.

The Round Bale Press of Anderson, Clayton & Co., producing what is known as Acco bales, has been perfected still further, so that the density of the bale is now 38 lbs. per cubic foot throughout. An appliance has been added which enables a continuous working of the press even while the bale is being taken out. The tare of each bale is exactly 2½ lbs. per bale of 250 lbs., the canvas covering completely the cotton. Cotton baled in this way is free from damage, overtare and pilferage. I know from reports received from various countries that these bales are well liked by spinning mills, and the increase that has taken place each year confirms the popularity which these bales enjoy.

#### Annual output of round bales:

1921-22	...	...	...	119,500 bales of 250 lbs.
1922-23	...	...	...	160,500     "
1923-24	...	...	...	224,800     "
1924-25	...	...	...	305,500     "
1925-26	...	...	...	344,500     "
1926-27	...	...	...	647,800     "
1927-28	...	...	...	*540,500     "
1928-29	...	...	...	800,000-900,000 estimated.

\* American crop was 5,000,000 bales smaller than in previous year.

There are two of these round presses working in Russian Asia, one in French Indo-China, four in Mexico. In the latter country I was told opposition was being made by the owners of the established

square-bale presses, and they were persuading the Government to prevent cotton being packed in round bales, on the plea that the fibre was being damaged. As the experience of the English and Continental spinners does not confirm such allegations, I have written a letter to the Minister of Agriculture explaining that the round bales are frequently preferred by mills, and that the fibre, in the opinion of the spinners, is not being damaged.

Personally, I believe that this press, which is, of course, much cheaper than the hydraulic press, would do excellent work in Africa, Asia and South America, and I would advise Colonial and other cotton-growing companies to communicate with Anderson, Clayton & Co., Houston, Texas, in order to ascertain the price under which the press could be delivered. In U.S.A. the round-bale press works under a royalty system.

### AVERAGE COST PRICE OF PRODUCTION OF THE AMERICAN COTTON CROP.

#### CARELESSNESS OF TENANT FARMER.

I am frequently asked what is the average price of producing cotton in U.S.A. That is a very difficult question to answer. Although I have endeavoured to obtain information by questioning farmers in all parts of the States, I cannot give a definite answer. The Department of Agriculture in Washington publishes from time to time information on the cost, and for the purpose of obtaining as exact particulars as possible they send out to the Cotton Belt a number of accountants who endeavour to trace, on a uniform scale, the cost of production. Of course, very few farmers keep books, and of those who do, only some are reliable, but the accountants examine carefully every item which enters into the cost, such as the farmers' own time, the charge for land, ploughs, etc. The costs vary very materially, according to the acreage which the farmer can cultivate. It is much lower in Texas, particularly in West Texas, Oklahoma, Arkansas, than in the Eastern States, owing to the hilly character of the land and the less energetic people which inhabit the East, namely, mainly negroes. In the season 1923-24 the average yield was 131 lbs. per acre, and the average price worked out to about 22 cents. In 1925-26 the yield was 167½ lbs., and the price worked out to about 18 cents. Now this season, according to the latest forecast, the average yield should be about 153 lbs., and this should work out, according to previous Government calculations, to 17 cents per lb. In all matters of crop statistics farmers' information must be weighed, for they exaggerate on an average from 10 to 12 per cent. their statements (that is, the bias established over a period of 30 years); therefore, roughly, 15½ cents should represent the cost of the crop. It is true that this year, owing to the wet season, there has been an extra expense incurred in replanting and in weeding the fields. If we, therefore, accept 16 cents on the plantation as the average cost of this year's crop over the whole Belt we shall not be far wrong. This means about 9½d. in Europe; but I wish it to be understood that I know of whole districts in West Texas where the cost will not be more than

9 or 10 cents, while, on the other hand, Georgia and Mississippi will not be able to produce cotton below 18 and 20 cents respectively.

One cannot help but be impressed by the very careless way in which most of the tenant farmers cultivate their cotton, how they leave their implements about in the open fields, and how untidy the appearance of the farmyards is. If any other class of people were to go about their business in such a haphazard way as the tenants (contrary to the owner-cultivators) do, they would soon lose their occupations.

#### GREER STAPLE COTTON BREEDING FARM, IOWA PARK, TEX.

I paid a visit to this establishment, which is raising in the North of Texas—Wichita Falls—cotton of  $1\frac{3}{16}$  ins. to  $1\frac{1}{4}$  ins. staple, the fibre of which is strong, uniform, and is extensively used in America



for the spinning of tyre yarns, which have to pass a severe test as regards resistance. The formation of the plant appeals to me as the bolls are large, open, easy to pick, and the formation of the bolls is in clusters. The yield is also satisfactory, both on

irrigated and non-irrigated land. I recommend colonial cotton growing companies to make a trial with this seed.

The company buys in many cases the cotton from those who plant their seed, and has therefore considerable quantities of cotton for sale direct to the spinners.

The following are the results of tests carried out by tyre yarn spinners with this  $1\frac{1}{4}$  ms. Greer cotton:—

The test on the specifications of one of the large tyre companies spun into  $22\frac{1}{2}/5/3$  has an average break of 15.58 and a stretch of 17.7 bone dry; an average elongation, bone dry, of 18.45. The specifications of this lot of cotton were: Gauge, .034 to .038; twist (5-ply 19.25 to 21.25), (cable, 9.40 to 9.90). The actual size was 23.36. The variation in twist was 18.80 to 21.54.

Another test of the same date made an average break of 15.61 and an average stretch of 19.35, bone dry. The specifications on this were: Gauge, .0335; twist (5-ply, 17.50 trs.), (cable, 7.50 trs.). This was spun into  $22\frac{1}{2}/5/3$ .

The third test with  $22\frac{1}{2}/5/3$  makes an average break of 15.33 and an average stretch of 19.15, bone dry. The specifications were: Gauge, .033 to .035; twist (5-ply, 19.0 trs.), (cable, 9.0 trs.).

These tests were made with  $1\frac{1}{4}$ -ms. Greer cotton, middling grade, by one of the largest cotton-spinning organizations in America on the specifications of several tyre manufacturers for whom they make cords and fabrics. This spinning mill is planning to use this cotton in place of Upper Egyptian cotton in the manufacture of tyre cords for their customers.

#### STANDARDS FOR STAPLE LENGTHS OF COTTON.

In my last year's reports I pointed out that the Department of Agriculture had the power to enforce that all cotton transactions, not only in the United States, but also throughout the world—unless the cotton was sold "on type"—had to be based on the American standards of length. Since then the Department of Agriculture has enforced that power, given to it by law.

In order to be able to submit to you an authoritative statement on the method adopted in the preparation of the staple standards, I asked Mr. Arthur W. Palmer, in charge of the Division of Cotton Marketing at the Bureau of Agricultural Economics, Washington, D.C., to send me a written statement on the subject, and with his permission I quote his letter:—

"The standards were established on October 25, 1918, by order of Hon. David F. Houston, then Secretary of Agriculture. They are defined in the following language:—

'The length of staple of any kind shall be the normal length by measurement, without regard to the quality or value, of a typical portion of its fibres under a relative humidity of the atmosphere of 65 per cent. and a temperature of 70° Fahrenheit.'

The lengths are expressed in inches, the shortest length definitely recognized being  $\frac{3}{4}$  inch. Under one inch the gradations are 16ths of an inch; upward of an inch they are in 32nds.



By a process of elimination, involving the examination of a great number of cotton samples taken from the whole Belt, the Department's specialists constructed in skeleton form what they considered to be a correct gamut of lengths. Each sample thus chosen served as a basis for the examination and consideration of the cotton actually used. Ten to fifteen bales of uniform cotton of each length were desired, one to be set aside as the original representation of the standard, and the others to be held for use as needed in the preparation of practical forms.

As a means of ensuring uniformity of character in each length, it was early decided that wherever possible all bales of any given length would be taken from 'crop lots'; that is to say, they were to be uniform as to variety and grown under conditions of soil and climate which would be most nearly identical. Where suitable crop lots could not be found, selections were confined to cotton from a single locality in which a near approach could be made to the desired condition.

In the first step some hundreds of samples of such bales were examined for each length. Of these there were selected some 50 or 60 samples, all of which were then re-examined by a committee of specialists. Any bale which failed of unanimous approval was then rejected. The bales approved by the committee in this preliminary examination were then ordered to be 'fan-headed.' This process consisted of removing one or two bands from the end of each bale, causing it to expand sufficiently at the end to allow each layer of cotton in the bale to be separately stapled. Bales which failed to pass this test for uniformity within themselves were immediately rejected.

At this stage new samples were taken from the approved bales and assembled in Washington, where they were presented for public criticism. Leading organizations of cotton growers, shippers and manufacturers were then invited to send qualified representatives, who examined each sample critically. The preliminary examinations had reduced the number of bales under consideration to not more than 30 or 35 bales for the lengths most frequently used, and to a somewhat smaller number in other lengths. The number of bales available in the final consideration was sufficient, however, to permit the rejection of any bale which failed of unanimous approval of the representatives of the invited trade groups. The surviving bales, that is to say, those which received unanimous approval, were immediately purchased. One of the bales was then taken for the original representation for each length, and the others placed in special storage for future use as needed. For record purposes laboratory analyses were made of the bales finally selected.

The preparation of practical forms follows a carefully laid-out system. Work proceeds with one length only at any one time. Each lot of cotton used is again stapled before it is placed before the workers for use, and each practical form is made up of cotton from three parts of the bale in use. Each operation is checked and counterchecked until the type is completed, certified and finally packed for shipment.

Through the opportunity afforded by the Department for criticism and objection, American cotton interests have put their

unqualified approval upon the 1929 series of the official cotton standards for length of staple. Applications for the 1929 standards which have been filled since January, 1928, now approximate 20,000 practical forms."

I have been informed by many American exporters who have taken part in the judging of the standard samples for lengths of staple at Washington that the utmost care had been taken in making up these standards and every one of the many shippers agreed that the standards as used by Washington are as perfect as humanly possible. The whole of the standards were examined five times by a committee of 20 experts, each expert independently inspecting the samples, and unless there was unanimous agreement on any one length, the bale was thrown out. There is no other organization in the world but the Department of Agriculture that could have undertaken this very formidable and costly task, which for this purpose collected, after very careful search throughout the Cotton Belt, a thousand bales. The Department of Agriculture sells the standard samples at a dollar each.

The Cotton Standards Act states that it is not lawful "to use any name, description, or designation not used in official standards, except in sales on actual sample or private type." The law thus prohibits the use of the Liverpool inch designation either in America or for export transactions.

The exclusive use of the inch is rather a hardship on the Continent which has been hitherto accustomed to buy in millimetre lengths. The most reliable equivalents in millimetres as compared to American standards which I could obtain are the following:

*American Standards.*

Ins.	
$\frac{1}{8}$	by 28 millimetre.
$\frac{1}{6}$	28 millimetre to full 28.
1	-- 28/29 millimetre.
$1\frac{1}{8}$	good 28/29 millimetre.
$1\frac{1}{6}$	28/30 millimetre.

The American length of  $1\frac{1}{32}$  ins. is used by the majority of American shippers against Liverpool  $1\frac{1}{8}$  ins.

Whilst the Continental Cotton Exchanges have agreed to admit in appeal arbitrations two representatives of the American cotton shippers, Liverpool has not yet seen fit to conform to this wish, which was brought forward by the American Cotton Shippers' Association in the summer of 1928.

#### VARIATION IN STAPLE OF TEXAS COTTON.

How the staple does vary in Texas from year to year is shown by statistics compiled by an exporting house.

	Less than			Full	28/29	Full
	1 m	2 m	28 m/m	28 m/m	m/m.	28/29
Season 1923-24	222	21	68,052	7,738	57,860	51,041
Per cent.	0.115	0.012	35.200	4.003	29.927	26.401
Season 1924-25	86	2,225	78,179	87,266	64,569	11,705
Per cent.	0.035	0.909	31.950	35.663	26.388	4.784
Season 1925-26	78	2,807	55,044	91,061	74,083	23,381
Per cent.	0.030	1.081	21.205	35.081	28.540	10.934
Season 1926-27	203	16,659	177,925	225,798	71,556	7,630
Per cent.	0.041	3.331	35.582	45.155	14.310	1.526
Season 1927-28	812	43,357	124,057	197,629	74,734	8,362
Per cent.	0.181	9.650	27.611	43.986	16.638	1.861

	28/30	Full		29/30		Total
	m/m.	m/m	29 m/m.	m/m.	30 m/m.	
Season 1923-24	1,160	6,855	49	307	24	193,333 B/C
Per cent.	0.601	3.546	0.025	0.159	0.012	100%
Season 1924-25	545	117	1	--	--	244,693 B/C
Per cent.	0.223	0.048	--	--	--	100%
Season 1925-26	6,466	1,585	55	9	8	259,577 B/C
Per cent.	2.491	0.611	0.021	0.003	0.003	100%
Season 1926-27	242	32	2	--	--	500,047 B/C
Per cent.	0.048	0.006	0.001	--	--	100%
Season 1927-28	247	65	16	--	--	449,299 B/C
Per cent.	0.055	0.014	0.004	--	--	100%

### MECHANICAL PICKERS.

In my last year's report I gave pictures and particulars of the various cotton-picking machines. I then expressed the view that the one put on the market by the International Harvester Company, Chicago, seemed likely to make progress in the near future. I was too late to see the actual tests this year, but the following information received from this firm shows that progress is being made.

### SPINDLE PICKER.

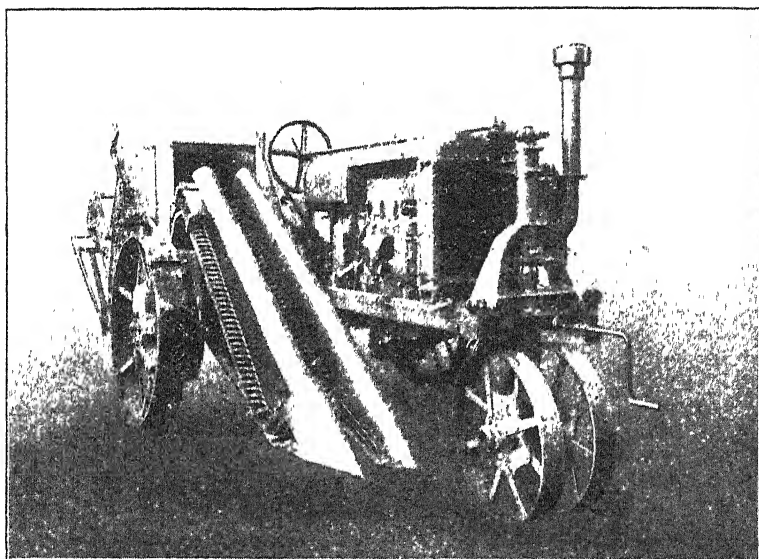
"A small number of these machines embodying many improvements have been scattered throughout the cotton growing areas again this season for further demonstration and test.

The percentage of cotton picked has been increased considerably by means of improved dividers which raise the bolls, which are close to the ground, high enough to be reached by the spindles, by modifying the spindles to make them more aggressive, more efficient spindle-doffing mechanism and various other minor improvements.

The grade of cotton has been considerably improved by the development of improved cleaning devices, which separate much of the leaves and other extraneous material from the lint.

In a recent test in South-West Texas with our latest improved picker, the machine-picked cotton contained considerable less dirt and trash and graded equal to hand-picked cotton in the same field.

Many of our large cotton growers are raising a new type of small-stalk cotton with several stalks in the hull, 30 ins. high, which offers much less resistance of the penetration of the picker spindles, the bolls are not so close to the ground, and machine picking, especially with the two-row machine, is greatly facilitated.



Combined Stripper and Boll Breaker and Cleaner of the International Harvester Company, together with Farmall Tractor.

#### COTTON STRIPPER AND CLEANER.

Our cotton stripper has been greatly improved, especially the attachment for our Farmall tractor, and we have developed a boll breaking and cleaning device which crushes the immature unopened bolls and separates the lint from the extraneous matter."

ARNO S. PEARSE.

*Manchester, 12th October, 1928.*

# Appendix to Report by Arno S. Pearce on His 1928 Visit to U.S.A.

## Notes on the Mill Inspection Tour.

### MILL No. 1 (New England).

We inspected a large portion of this vast mill.

The sheetings made here range from 40 ins. to 108 ins.

One weaver looks after 28 sheeting looms of 72 ins. to 108 ins. There is one battery filler to 48 looms. All the looms are Draper's automatic Model "E."

Of the 40-in. wide sheetings one weaver looks after 50 looms.

The manager explained that three years ago they had 8, 10 and 12 looms to a weaver; then he engaged what he termed a "study man" to watch every movement of each operative, and confined the spinner to spinning, the weaver to weaving, the cleaner to cleaning, etc.; in other words, everyone was limited to work only on his or her job. The task allotted to each was gradually increased, so that in the weaving he has reached the above figures; in the spinning room one tenter attends to 2,200 spindles of 20's count, earning roughly \$18.00. Other particulars as to the number of machines per operative and wages will be given further on.

There are in normal conditions 2,500 operatives employed in this mill. Before the introduction of the specialization of labour system they had 3,200, which means an annual saving of \$1,000,000.

Operatives are fined for bad work. There is no extra pay for weaving with artificial silk, and no extra pay for night work.

Machinery.	No. of Machines.	
Bale openers ... ..	...	14
Combined hopper openers ... ..	...	52
Finishers ... ..	...	57
Cards ... ..	...	900 40 ins. wide.
Drawing frames ... ..	...	112 (2 sets only).
Slubbers :		
1 man to 2 frames ... ..	...	100 (72 spindles each), 12 ins. lift, 6 ins. dia.
Inters. :		
1 man to 2 frames ... ..	...	71 (82 spindles each), 9 ins. lift, 4½ ins. dia.
Rovers :		
1 girl to 2 frames ... ..	...	208 (160 spindles each), 7 ins. lift, 3½ ins. dia.
Total hands in Card Room ... ..	...	417 Average wage, \$19.00 per week.
		Carder, \$50.00 per week.

*Spinning.* 1,200 frames of 224 spindles. One tenter looks after 2,200 spindles, at \$18.00 per week. One cleaner looks after 4,400 spindles, at \$16.00 per week. One doffer to every 30 frames, according to counts; average counts 22's.

Cost per lb., labour only, 4.5 cents. Total cost per lb., 8 cents, allowing 12 per cent. waste. Based on full time, 54 hours.

In this mill the manager was extremely pleased with the *Leesona Universal Winding Frames*; they enjoy a very high reputation, both North and South, and are very extensively used.

As these winding frames are becoming popular in Europe, and as this manager had made careful calculations, I give the following details —

*Estimate of equipment required to handle 55,000 lbs. of 22/1's per week of 54 hours:—*

3 High-speed warpers, at \$845	..	..	..	..	\$2,535.00
3 Magazine cone creels—400 ends each, at \$2 per end	..	..	..	..	2,400.00
18 Anti-lint fans for the creels, at \$30 each	..	..	..	..	540.00
9 96-spindle No. 60 GF cone winders, arranged for belt drive,					
at \$3,080 each	..	..	..	..	27,720.00
4,800 Cones (wood), at 13 cents each	..	..	..	..	624.00
Total	..	..	..	..	<u>\$33,819.00</u>

*Details of Operation of Universal High-Speed Warping:—*

Between 50,000 and 60,000 lbs. of 22/1's per week of 54 hours; beams have 359 ends: 22,500 yards long.

#### WINDING.

Calculated speed—555 yards per minute.

Drum-shaft speed—2,742 r.p.m.

Actual yarn take-up—505 yards per minute.

Average yarn slip—10 per cent.

Cones are  $7\frac{1}{8}$  ins. in diameter, and weight  $3\frac{1}{2}$  lbs.

The winder operatives are paid by the wound cone.

The winding rate is .00571 per lb. or 2 cents per  $3\frac{1}{2}$ -lb. cone.

Operatives' earnings average \$18.50 per week.

Efficiency of the winding machines is 73 per cent.

Production per spindle—64.7 lbs.

Production per operative—3,174 lbs.

Operatives take care of 48 spindles each.

Supply bobbin contains 3,200 yards (full), and is spun on  $1\frac{1}{4}$ -in. ring.

Boyce weavers' knotters are in use.

The winder girls have been trained to piece-up ends, etc., when travelling from head end to tail end, and then walk back to head end; they never turn back on the outward journey.

Three gangs of 96 spindles each are required to feed each warper at 350 yards per minute.

*Operative production for week is as follows:—*

Operator No. 1	..	930 cones	..	3,255 lbs.
Operator No. 2	..	897 "	..	3,139 "
Operator No. 3	..	937 "	..	3,279 "
Operator No. 4	..	864 "	..	3,024 "
		3,628 "	× 3.5	12,698 "

*Warping.* Various speeds have been tried, from 300 yards per minute to 480; 350 yards per minute has been found to be more satisfactory. At this speed a beam is run off in 76 minutes, but at the time of our visit the mill was running at 440 yards; 24,000 yards on a beam, 22's.

Two girls on three creels, creeling only, at \$15.00 per week. One girl at three fronts, \$18.00 per week.

Yarn breakages per beam average 10.4.

Efficiency of the warper is 84 per cent.

One girl will take care of three warper units.

Two creeler girls will "creel" in three Magazine creels (400 ends each).

Labour required as follows:—

18 winder hands	..	\$ 18.50 each	..	\$ 333.00
2 cone haulers	..	15.00 "	..	30.00
1 second hand	..	28.00 "	..	28.00
1 warper hand	..	25.00 "	..	25.00
2 creel tenders	..	16.00 "	..	32.00
24				<u>\$ 448.00</u>

Total cost of warping and winding is 0.893 cents per pound.

*Comparison of Labour :—*

The following figures were obtained from the mill, and show comparison of the labour costs, direct and auxiliary help, between the Universal System and old-style warpers.

		Direct Labour.	Auxiliary Help.	Total.
Spooling		\$	\$	\$
Old Style	... ..	.0081	.00105	.0092
Universal	... ..	.0056	.0007	.0063
Warping				
Old Style	... ..	.00285	.00055	.0034
Universal	... ..	.0015	.0002	.0017
Totals of both operations :				
Old Style	... ..			.0126
Universal	... ..			.0080

The saving of 0.46 cents, practically 1 cent per pound, shown above, is equal to a return of 44.8 per cent. on the cost of the equipment.

*WEAVING.*

One weaver looks after 28 broad Draper Northrop looms, 72 ins. to 108 ins. reed space; one battery hand looks after 48 broad Draper Northrop looms, 72 ins. to 108 ins. reed space; one battery hand looks after 50 frames, 30 ins. to 40 ins. reed space; one battery hand looks after 100 frames, 30 ins. to 40 ins. reed space. One stop per loom in two hours.

Average weaver's wage, \$20.99 per week. Tackler, \$28.00 per week.

Average cost per pound of cloth, 41 cents, 1.53 lineal yards to 1 lb.

I learned from the Draper Corporation, which make the Northrop loom, that it had been found out from long observation that a weaver can in nine hours start up 300 looms. It is all a question of the amount of yarn breakages as to how many looms can be worked per operative. They quoted a mill producing the ordinary print cloth, with cotton  $\frac{3}{8}$  in. to  $\frac{1}{2}$  in. staple, where 80 looms are worked by one weaver, yet some of the looms are 30 years old. All yarn, of course, has to be tied with a proper weaver's knot; they recommended the Boyce knotter or Barber-Colman.

In Draper Corporation experimental works I saw a fast-running warping machine running at 350 yards per minute, but this is not yet perfected.

*Cloth Room.* Average Wage, \$15.57 per week.

There is the usual Accident Ward and a large room with blackboard, where once a week all the foremen are called in for instruction and exchange of experiences.

The firm spends every year \$350,000 on advertising; it sells the goods through its own agency.

*Costings.* The manager, when asked what his labour cost was for 20's, up to the cop, looked up his calculations and read out: 4.4 cents per lb. in a 54-hour week, but including overhead expenses, waste (not cotton) the price is about 8 cents per lb.

The manager also produced his tables showing the differences in cost when running the mill only partially. The following are the data:

	Cost per lb. sheeting, including everything 90 ins. to 1.53 lineal yards per lb.
100 per cent. running	45.95 cents per lb.
60 " " "	48.602 " " "
50 " " "	49.78 " " "

The tax is 77 cents per spindle, City and State taxes combined.

*Average Wage per Operative, North and South.* The manager of one company in New England, who also has under his supervision mills in the South, said: "Whilst the average wage in their Northern mill works out to \$18.60 per 54-hour week, they pay on an average in Georgia \$15.60 for 55 hours and \$10.80 for 60 hours in Alabama. The cost of the mill village

will add some few dollars to the Southern wages. The further North one goes, the higher the wages.

#### MILL No. 2 (New England).

This is another large mill, comparatively new, both as regards architecture and machinery. The end portion of the cotton warehouse contains Saco-Lowell bale breakers; from there the cotton is conveyed into the blowing room, which forms part of the spinning mill proper. The cotton was distributed automatically to 10 feed openers, the feeding channels opening or closing according to the weight of cotton in the hoppers; 640 bales are handled in 48 hours. One man, receiving \$21.85 for 48 hours, looked after these 10 machines; 10 per cent. more for night work. These 10 combined hopper-feed openers were supplying 30 finishers, attended by 8 men, and turning out 10,000 lbs. per opener.

Weft and twist were treated quite separately throughout the mill; thus there was a distinct blowing room, card room and spinning room for warp yarn, and another set of machines for twist yarn.

Throughout the mill Parker-Cramer automatic humidifiers were used, shutting off steam when 65° are reached; they seem to work very efficiently.

The cotton used is  $1\frac{1}{8}$  ins. (American standard) strict middling for weft and  $1\frac{1}{4}$  ins. for twist.

*Card Rooms.* The two card rooms had 428 cards (214 in each). One tender attended to 18 cards 40 ins. wide; the men received \$21.85 for 48 hours. (These are regarded as unskilled labourers, and that is the wage basis for all unskilled men.)

There are 164 deliveries of eight ends up on the *Evener-Drawing Frames*; these are specially tested and wrapped four times a day each by two men, and they are adjusted accordingly. There are 224 deliveries of drawings of six ends up. Only one head of drawing is used, as against the customary three in Lancashire. 41 women look after these deliveries at a wage of \$16.94 per week of 48 hours.

*Slubbers.* There are 32, each 68 spindles; front roller revolutions, 224; spindle speed, 675; 12 ins. lift. One man looks after two slubbers.

*Production.* 64 hanks per spindle, half-hank bobbin.

*Piecework rate.* 22.8 cents per hank; \$22.10 per week.

*Intermediates.* Each 84 spindles; front roller revolutions, 172; spindle revolutions, 872; 10 ins. lift. One man looks after two machines. Production, 57 hanks each frame. Piecework rate, 25.90 cents per hank;  $1\frac{1}{4}$ -hank bobbin.

*Roving.* Each machine 160 spindles; front roller, 122 revolutions; spindle speed, 1,216; hank roving, 41. One woman looks after one pair; no back tender; piecework rate, 22.40 cents per hank; production about 40 hanks per spindle.

*Wages (others) in Card Room.* One carder, \$3,000 per annum; two under-carders, each \$41.65 per week; one grinder for every 54 cards, \$21.65 per week; one stripper for every 18 cards.

*Production per card.* 700 lbs. per week of 48 hours.

NOTE. All the preparation and spinning machinery in this mill was made by Saco-Lowell, Boston, Mass.)

*Ring-Spinning Room for Weft Yarn.* Almost 100,000 spindles are housed on one single floor. Each frame has 112 spindles per side,  $2\frac{1}{2}$  ins. gauge; front roller speed, 150 revolutions; spindle speed, 8,400 revolutions per minute; counts throughout the room, 22's; ring,  $1\frac{1}{8}$  ins.; lift,  $6\frac{1}{2}$  ins.; 10 sides to a tender, earning \$2.45 per side per week; doffs every  $2\frac{1}{4}$  hours. One man doffer for every 10 frames at \$2.75 per frame. Double roving throughout; 4.5 hanks double roving. One tackler to every 45 frames, at \$27.90 per week. Five men oilers for 334 frames, at \$20.35 per week. Eleven women cleaners, at \$16.00 per week. One overseer, \$3,000 per annum. Two foremen, at \$41.65 per week each.

There are 334 weft frames, each 224 spindles, and 112 twist ring frames, each 216 spindles.

*Ring-Spinning Room for Twist Yarn.* Above the weft-spinning room is situated the twist-spinning room with 298 frames, each 216 spindles, 3 ins.

# **BROOKS & DOXEY**

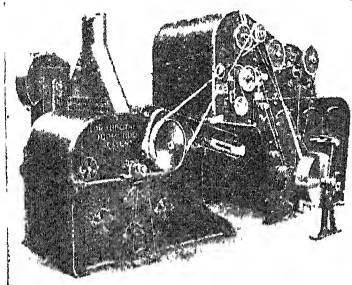
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### **Textile Machinery Makers**

**UNION IRONWORKS, WEST GORTON, MANCHESTER**

P.O. BOX No. 31.

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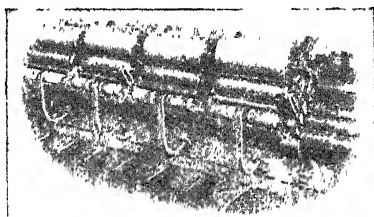


A Machine to replace the Porcupine Feeder, and capable of 100 per cent. greater opening and cleaning of Cotton.

Write for Pamphlet describing its special construction and features.

#### **IMPROVED FOUR-ROLLER HIGH-DRAFT SYSTEM, FOR RING FRAMES**

Tests willingly made with Clients' own material in our Showroom.



Send in your Roving or Intermediate Bobbins, stating counts and turns per inch required, and we will undertake the test with the least possible delay. Many thousands of spindles have been supplied, in addition to a large number of frames now being converted.

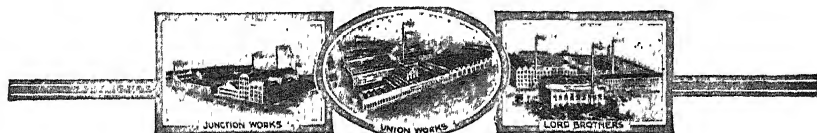
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*Representatives in all the principal Cotton Manufacturing Countries of the World.*

*Incorporated in our Firm are the well-known Blowing Room and Waste Machinery Specialists.*

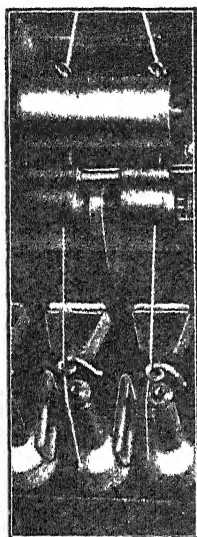
# **LORD BROTHERS**

**TODMORDEN, ENGLAND.**



**HENRY MEYNELL & CO. LTD., ACCRINGTON**

Sole Licensees and Manufacturers (for existing machinery) of the

**BEST SYSTEM OF HIGH-DRAFTING YET KNOWN**

THE PATENT  
**V.T.R.** PULL-THROUGH  
 DRAFTING-SYSTEM



Get a grip on your spinning methods!  
 Turn your losses into profits!  
 V.T.R. can save the cotton trade!

Therefore

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**Save your trade!**

**BEATS ALL OTHER SYSTEMS**



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'Phone 2035

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Who desire Satisfaction and Economy should

. . follow the example of those who use . .

**WILCOCK'S QUALITY LEATHER and**  
**HAIR BELTING, PICKERS, PICKING**  
**BANDS, ROLLER SKINS, Etc.**



**WILCOCK BROS.**

**ASHTON-UNDER-LYNE**

**ENGLAND**

INDIA	.	.	.	.	N. WADIA & SONS, <i>Bombay</i>
ITALY	.	.	.	.	S. A. GIO. VIGANONI, <i>Milan</i>

gauge, 7 ins. lift, 4½-hank double roving. Front roller, 132 revolutions per minute; spindle speed, 9,400. Ten sides to a tenter, earning \$1.95 per side; doff every 5 hours 20 minutes. One overseer, at \$3,000 a year, who also looks after warping and spooling, of which there are 13 spoolers of 150 spindles each. Barber-Colman latest automatic spooler; one woman looks after 75 spindles, at \$23.00 per week. There are 12 high-speed warpers (Barber-Colman); one woman looks after two warpers, at \$25.00 per week. Speed of spooler, 1,500 yards per minute for 22's to 28's. Speed of warper, 550 yards per minute on 22's. Length of yarn on warper's beam, 24,000 yards; 354 ends. Two men creelers.

The spinning rooms are 800 feet long, 135 feet wide, and 17 feet high. Total spinning production per week of both rooms, 285,000 per week on 22's.

*Barber-Colman Spoolers and High-speed Warpers.* The installation in this mill costs \$200,000, and we were told by the technical director that it saves a great deal of money; he regarded it as a very good investment. Spooling and warping costs them only ½ cent per pound in labour.

As the speeds for these machines which were given to me in various mills which I visited seemed almost incredible, I wrote to the head office of this Company, and received the following reply:—

"The production of our spoolers in pounds of yarn is largely dependent upon the size of the bobbins, and as the production of a spooler girl on an ordinary spooler is also dependent upon the same factor, the two are comparable. We have found that one of our automatic spoolers operated by two girls will do the work of approximately six girls equipped with Barber knotters operating ordinary spooling frames. The following table will serve to give some idea of the variation in production due to the various sizes of bobbins used:—

Yarn No.	Ring	Traverse	Bobbins per pound	Pounds per hour
8's ..	2 1/16"	7"	4.15 ..	420
11's ..	2 1/16"	7"	4.00 ..	400
16's ..	2"	7"	4.95 ..	370
22's ..	1 7/8"	7"	5.00 ..	350
22's ..	1 3/4"	6 1/2"	6.95 ..	250
22's ..	1 3/4"	6"	8.25 ..	230
30's ..	1 3/4"	6"	9.50 ..	200

The above data are based on information obtained from different mills operating our machinery on these yarn numbers. The variations illustrate the fact that the production in pounds of yarn per week is likely to vary greatly in different cases. As just pointed out, this is due principally to the size of the bobbins. An operator can handle approximately the same number of bobbins, regardless of whether they are large or small, and in the case of large bobbins the production in pounds will be correspondingly greater. Therefore, in order to make a reliable estimate as to the probable production in any given case, detailed information has to be obtained covering the various factors which affect it.

One of our high-speed warpers will do the work of approximately six ordinary warpers, and one high-speed warper usually has a little greater capacity than one automatic spooler. In several mills using these machines, our warpers have produced from 40 to 45 beams of 22's yarn per week of 54 hours with from three to five stops per beam. In other mills running 30's yarn, the stops have reached ten per beam for 30,000 yards. The spooler speed is ordinarily 1,200 yards per minute and the warper speed 500 yards per minute."

*Slashing Frames.* 11 men at about \$35.00 per week.

*Barber-Colman Warp-Tying Machines.* Front man, \$29.00 per week of 48 hours; back man, \$24.00 per week of 48 hours.

*Weaving Shed.* Looms, average reed space, 72 ins. All on sheeting cloth, plains and twills. 68 × 72, 22's and 22's. One weaver looks after 16 looms of 36 ins. reed space; one weaver looks after 10 to 12 looms of

72 ins. reed space; one weaver looks after 10 looms of 90 ins. reed space. They earn 28 to 32 dollars per week. No fining system. Battery filler looks after 36 looms, earning \$16.00 per week. One tackler looks after 80 looms, and earns \$36.00 per week. The weavers' beams are brought into the shed by means of an electric truck, and cloth is taken out in the same way.

*Driving.* Electric power is bought at 1.3 cents per kilowatt from generating station close by. They found that it is cheaper than generating their own by turbine, as they have no use for surplus steam.

In the blowing room individual motors were used for each machine. In the card room the cards were driven on the group system by 150-h.p. motors.

In the spinning rooms they have a large number of frames driven by group motors, four frames to a motor, but they found that individual motors with chain and direct drive are more efficient. As only one count is spun, direct drive is preferred.

All spindles are driven by the tape drive.

The whole of the 4,047 looms are driven by individual motors of the General Electric Company.

The upkeep of the motors works out to 2 cents per annum and per motor.

*Quality of Cloth.* The firm makes practically only one well-known quality of sheeting, and great care is taken to keep up the quality. Large amounts are spent on advertising, e.g., one page in colours for one issue costs the firm almost £4,000. Owing to the goodwill obtained through the quality of the goods produced, the firm was making a fair profit whilst many others were losing money. The costs of production are very high; they claim to pay the highest wages in U.S.A., 40 per cent. more than in the South. The labour costs for spinning 22's are 4.5 cents per lb., the same as in Mill No. 1.

It is not the practice to run the looms during meal times, as experience has taught the firm that in an hour practically all looms without attendance stop, and that more time was lost in restarting than was gained by running the looms during meal times. We are told that other mills allow the looms to run 20 minutes during meal times, etc., as it was found economical to do so. After 20 minutes they shut off the power.

This mill has its own bleachworks. They make up the sheetings, cut sheets and hem them.

The whole of the output is sold to one house in New York.

There is an emergency room, such as is found in most mills here; each operative has a locker, and each girl has a stool to sit on at the end of her machine. Most of the girls had neat clothing, artificial and real silk stockings.

The bulk of the operatives are French-Canadian, the remainder almost entirely Polish, with a few Germans and Scandinavians, American-born.

There is a special competition to avoid accidents; the department which has none during the month receives a gold star, but no money premium.

The windows are opaque fluted glass, except for one row of about 12 ins. in each window to enable operatives to look out; originally the whole windows were opaque, but this was altered for the benefit of the workers.

Contrary to the usual practice in U.S.A., the machinery was well fenced.

For taking roving waste off the bobbin they use compressed air at a pressure of 34 lbs. to the square inch. So long as there is only one layer on the bobbin the current of air will blow the waste off. This invention was suggested by an operative, and has been adopted in several mills.

### MILL No. 3 (New England).

There were 1,200 Stafford shuttle-changing looms in one shed, weaving principally voiles, but also some poplins. The looms were driven by group motors, situated in the cellar. The Parker-Cramer automatic humidifier was at work.

The loom has, on the left, nine shuttles in a magazine, ready threaded, and when the bobbin or cop in the shuttle becomes empty the loom almost stops for a few moments, or going very slowly for 4 seconds, being equivalent to losing about 10 picks, on every change, ejects the empty shuttle, and takes into its place automatically one of the nine out of the magazines.

The makers of this loom in England are Vickers Ltd., Crayford, Essex. They state that :—

1. A light shuttle may be used, whilst with all battery looms large shuttles must be employed.

2. That once the shuttle-changing loom is set, it works perfectly, whilst with the quick-change battery—during full working of the loom—smashes do occur, and cannot be prevented, as the slightest disarrangement of the mechanism causes a stop.

3. Whilst with a battery loom one has no control of the weft thread at the moment when the bobbin is transferred, i.e., one or two picks run empty, with the Stafford loom the action is exactly as in the ordinary loom, but performed automatically. (The new battery looms overcome this difficulty.—A. S. PEARSE.)

4. A greater diversity of fabrics can be made with a shuttle-changing loom than with the battery loom.

In this mill, 24 looms, about 40 ins., were worked by one operative. There was one tackler to 126 looms, and one shuttle filler to 48 looms.

Wages worked out as follows: Loom tackler, \$32.00; two helpers, putting in warps on the 1,200 looms, \$28.00; weavers on 24 looms, 0.0031 cents per 1,000 picks; bobbin hand for every 48 looms, \$16.00.

The mill worked 48 hours per week day shift, and 60 hours per week night shift. During day shift, female labour was employed, but during night only male labour, as prescribed by law. Day efficiency, 92 per cent. : night efficiency, 89 per cent. A pick-counter, by Root, showing night and day picks per operative, was placed in a prominent position on each loom frame.

The looms did 160 picks per minute—40 ins. reed space.

Staffords maintain that it is better to run slower and give the weaver more looms, which means a saving in the raw cotton mixture. The highest number of looms of Stafford make worked by one operative are 48 in Fall River on a coarse cloth, 40 ins. reed space.

Saco-Lowell warpers, running at 250 yards per minute were used.

In this mill were 75,000 ring spindles, all combed yarn, 50's count. They have some very obsolete combers, but have recently put in Tunstall combers, made by the Alsatian Machine Works, Worcester, Mass. These are double-sided combers, six heads on each side, with which they are satisfied. It was a high-production machine, but the quality of work did not seem as good as the Nasmyth comber. They had one of the latest types of Hetherington's Nasmyth comber giving good work, but not the same production as the Tunstall.

They stated that the average wage over the whole mill, spinning and weaving, was \$21.00 per 48 hours, day shift of 48 hours. The night shift, being 60 hours, is correspondingly higher.

One of the directors of a mill in New Hampshire told us that they have 3,500 looms producing print cloth, 28's warp, 39's weft, 68 x 72 and 80 x 80. They have 72 looms per weaver on 68 x 72 cloth, 60 looms per weaver on 80 x 80 cloth, each earning about \$28.00 per week.

They have also 150,000 spindles in that mill.

For both the spinning and weaving they do not employ more than 850 operatives, often only 800.

Mr. Sidney B. Payne, formerly of the General Electric Company's Textile Department, said that in U.S.A. there were at present about 200,000 individual electric motors driving textile machinery. He prefers chain drive to gear, but where there is no change in counts the direct drive is best.

There is no more shuttle kissing in this country.

**MILL No. 4 (New England).**

110,000 spindles, 2,500 looms. Average counts, 29's. Cost of production, 12.5 cents per lb. Mostly printers' 80 × 80, 48 looms per weaver, 60 × 60 40's, as many times as 72 looms per weaver.

Departments	No of operatives	Rate per week of 48 hours estab. 1828 in Dollars	Per Cent of Decrease against 1925 schedule
Carding . . . . .	137	21.58	2.36
Spinning . . . . .	118	19.47	6.12
Twisting . . . . .	36	16.16	4.98
Spooling and Warping . . . . .	50	17.89	5.85
Silk Winding . . . . .	27	18.04	3.79
Roller Covering . . . . .	3	26.71	—
Slashing and Web Drawing . . . . .	31	22.63	1.08
Bobbin Cleaning and Yarn Conditioning . . . . .	20	18.66	3.18
Weaving 1 and 2 . . . . .	186	24.63	5.67
Cloth Room . . . . .	49	16.22	3.13
Sanitation . . . . .	9	18.08	6.10

YARN MILL—189 frames, each 272 spindles - 51,408 spindles.

Carding . . . . .	57	20.87	1.59
Spinning . . . . .	59	19.42	4.92
Spooling and Warping . . . . .	43	19.01	5.48
<hr/>			
Total Cotton Division, exclusive of overseers . . . . .	855	20.65	4.45
Overseers . . . . .	7	58.71	—
<hr/>			
Total of Cotton Division with overseers . . . . .	862	21.00	4.35

**OVERSEERS.**

1928.

**MAIN MILL.**

Per week

Carding, spinning, spooling, warping, twisting, silk winding, silk spooling, and silk warping . . . . .	\$78.00
Dressing . . . . .	55.00
Cloth Room . . . . .	50.00
Weaving 1 and 2 . . . . .	78.00

**YARN MILL.**

Carding . . . . .	55.00
Spinning, spooling and warping . . . . .	55.00

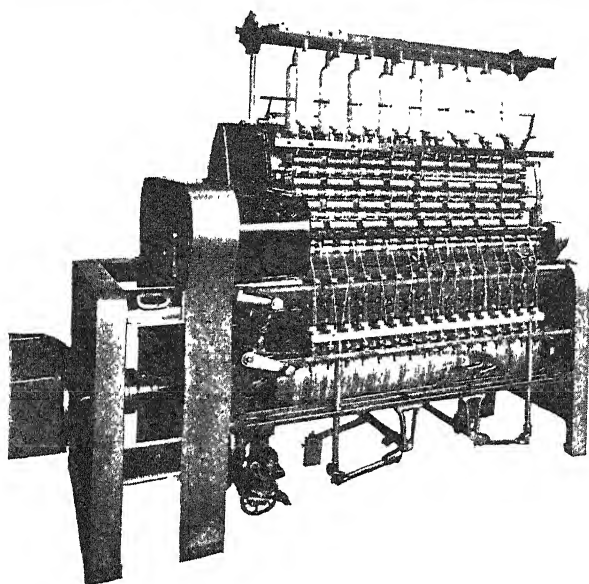
7 Overseers \$441.00

This firm has another mill with 150,000 spindles and 3,500 looms, situated in New England. At all their mills the labour specialization system has been introduced. At this mill the saving per year meant \$400,000, owing largely to a reduction of operatives from 1,100 to 850. They used to run 18 looms to a weaver; now the average is 72. On going over to this system they paid the operatives an increase of 10 per cent.

They weave a great deal of artificial silk, both warp and weft, alpaca, artificial silk and cotton. They singe artificial silk cloth (a practice not always carried out in England), 8 to 12 looms with artificial silk to a weaver, Barber-Colman's high-speed spooler and warper is used, and gives every satisfaction.

3 OPERATIONS IN ONE

CUT DOWN WASTE



## PUT YOUR RING FRAMES AND MULES ON ARTIFICIAL SILK !

The artificial silk trade is growing, soon there will be a big demand for artificial silk yarn—why not supply it?

Fit the Ferrand patent to your existing ring frames and mules and you can produce perfect results—a real yarn, not a substitute. It is a revolutionary invention, it cuts down waste, time, labour and overhead charges. Drafting and spinning is done in one operation from the slubbing or Condensor Bobbin. Any counts can be produced and the drafting is continuous, with no brake draft. Intermediate, Roving or Jack Frames are unnecessary, and the Ferrand patent is inexpensive to fit.

## TRIPLEX SPINNING FRAME

FERRAND'S PATENT No. 231067

**Sole Patentee: F. FERRAND**  
**Room 220, Royal Exchange, Manchester**

ESTABLISHED 1789

# JOH. JACOB RIETER & CO., LIMITED.

*Makers of*

All Kinds of Machinery  
for Cotton Spinning and  
Doubling Mills.

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ERMEN'S ENDLESS CLEARER CLOTHS  
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ALL DIAMETERS IN STOCK

ROLLER CLOTHS.	CLEARER FLANNELS
ROLLER HOTS (Tubes).	ROLLER VARNISH
GREEN CLEARER PLUSHES.	SIZING FLANNELS

CHROME CALF LEATHERS FOR HIGH-DRAFTING  
ROLLERS

WEAVING IN ROOM No. 1.		Rate per week	Total
545 Draper Looms		48 hours (1928)	Wages
6 tacklers—		in Dollars	
plain looms, no feeler,	112		
plain looms, with feeler,	80	32.16	192.86
2 section girls, 515 looms	..	20.40	40.80
1 shafting oiler .. ..	..	19.68	19.68
1 loom oiler .. ..	..	17.76	17.76
1 cloth doffer .. ..	..	17.76	17.76
1 filling man—also picks up bobbins	..	19.20	19.20
4 loom cleaners, 100 looms each	..	15.84	63.36
1 loom cleaner, 150 looms	..	22.08	22.08
7 battery fillers .. ..	..	14.88	104.16
24 total hands .. .. . (average)		20.74	497.76
13 weavers, piece work .. ..	..	28.00	364.00
37 total hands .. .. .	..	23.29	851.76

WEAVING IN ROOM No. 2.		Rate per week	Total weekly
		48 hours (1928)	wages
		in Dollars	48 hours
2 second hands :			
1 for 1,010 looms, Draper	}	41.52	83.04
1 for 979 looms, Draper			
2 clerks for 1 and 2 weaving rooms	..	20.40	40.80
22 tacklers :			
plain, no feeler .. 112 looms	}	32.16	707.52
plain, with feeler .. 80 "			
fancy, with feeler .. 70 "			
plain silk, with feeler . 70 "			
silk warp .. .. 60 "			
leno fancy .. .. 50 "			
3 spare tacklers for changing .. ..	..	30.48	91.44
8 section girls, 250 looms each .. ..	..	20.40	163.20
1 shafting oiler—takes care of			
humidifiers and brushes down .. ..	..	23.28	23.28
4 oilers—oil and give out filling—			
collect bobbins, 3 at 54 hours .. ..	..	26.19	78.57
1 at 48 hours .. ..	..	17.04	17.04
2 cloth doffers .. ..	..	22.56	45.12
1 cloth doffer, doffs cloth at cut, marks			
and runs tape loom .. ..	..	20.16	20.16
1 loom tackler, sample room .. ..	..	32.16	32.16
1 weaver, sample room .. ..	..	24.00	24.00
13 loom cleaners, 150 loom basis .. ..	..	22.08	287.04
27 battery fillers .. ..	..	14.88	401.76
2 spare weavers, starting new work .. ..	..	17.04	38.08
89 operatives .. ..	..	23.02	2,049.21
60 weavers, piece work .. ..	..	28.00	1,680.00
149 total hands in No. 2 room .. ..	..	25.03	\$3,729.21

The machinery was mostly old, 1906.

In the card room they had 10 card tenters, averaging 19½ cards each, with help from grinders at stripping; 7 comb tenters, each 6 combers.

In the spinning room, with 40,392 spindles, they had: 4 section men, each for 40 frames, do all fixing and changing; 2 band boys do banding, oil pulleys and under frames, put up roving on frames (44 frames each); 1 roving boy puts up roving on 71 frames and oils 4 sweepers, 8 cleaners; 7 doffers each doff about 43,000 warp and weft bobbins per week (piece-work, \$16.80); 2 doffers for Whittin frames, 12's to 24's warp; 17 spinners (159 frames), (piece-work, \$21.15).

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 THE LOOM THAT NEED NEVER STOP
 

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# MODERN WEAVING

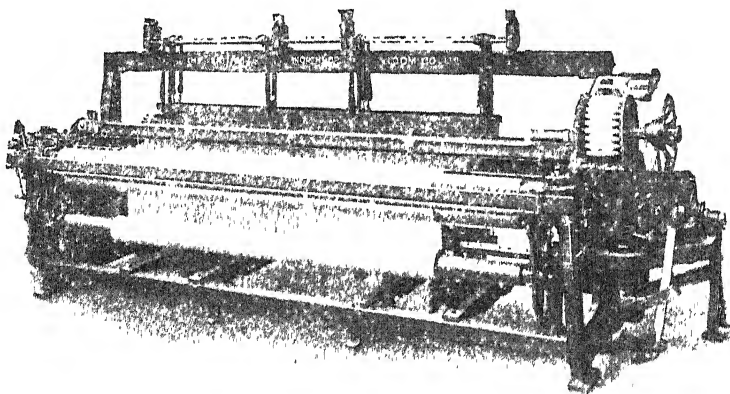
*means*

24 LOOMS PER WEAVER - TWO SHIFTS

95% EFFICIENCY

Automatic Machinery producing for 16 hours per day is the modern method of cutting costs . . . . . but the machines must be automatic.

Make the machines work longer hours not the men.  
Make the machines produce more, so that the operatives may earn more.



Northrop Automatic Loom

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Alsace, Lorraine and Vosges	Weiss & Jordan, 24, Rue St. Clair, Mulhouse.
Argentina - - - -	E. Ashworth & Co., Manchester.
Australia and New Zealand	J. Wood, Sydney and Melbourne.
Brazil - - - - -	Henry Rogers, Sons & Co., Ltd., Wolverhampton.
France (Nord) and Belgium	Baerlein & Sons, Ltd., Manchester
	Paul Vaudehene, 41, Rue Montagne aux Herbes Potagères, Brussels.
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Germany (Westphalia) -	Carl von Gehlen, Rheydt.
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Japan - - - - -	Takata & Co., Ltd., 69, Old Broad St., London, E.C.2.
Scandinavia - - - -	George Thomas & Co., Ltd., Manchester.
Spain - - - - -	White, Child & Boney, Ltd., London, S.W.1.

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The BRITISH NORTHROP LOOM Co. Ltd., BLACKBURN, ENGLAND

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**MILL No. 5 (New England).**

These are very large mills, spinning all the yarn required. In one mill they have 2,400 looms, mostly dobbies, many of them producing artificial-silk designs. The owners spoke very favourably of the Stafford shuttle-changing loom for artificial silk.

They have 8 to 16 dobby automatic looms to one weaver (8 is the minimum). They have now running 12 artificial-silk Jacquard looms per weaver. The owner is a great believer in the specialization of labour. Even his up-to-date mill did not despise calling in the time engineer experts. They get 75 to 80 per cent. efficiency on the automatic dobby looms. In this mill they work 48 hours on five days. If they do work on Saturday they pay 25 per cent. overtime. They work 60 hours at night, mostly all men, paying 10 per cent. extra. During night the engine never stops. Women may work during the night in factories in this State.

Night electric current costs less than 1 cent per kilowatt; therefore they use it during the night. During the day they produce their current by turbine engines, boilers heated by oil, which comes by sea close to works. New and more efficient boilers were being installed. They produce during day their own power as they require steam for the extensive dyeing and finishing plant.

In the card rooms they had one Cook's vacuum to each card, cleaning three to four times per day. Output 280 lbs. per card.

Tacklers earn \$38.00; weavers, \$25.00 per week; no unionists.

One ring tenter looks after 2,106 spindles, 40's, and receives \$20.00 per week. They do not clean.

In this mill the tacklers struck when specialization of labour was being reorganized. They stayed out nine months, but had to give in, as the owners guaranteed each weaver to make up losses in wages caused by loom stoppage.

In going through this mill one cannot help but recognize that the work done is on a level with the best concerns in Europe; the mill looks tidy, and the operatives are clean. The range of designs produced is marvellous. Bright colours, new designs in a range such as few, if any, European mills possess.

Prints have been the great fashion this year in U.S.A., and consequently woven designs have not been so much in demand.

**MILL No. 6 (New England).**

Women work in this State only 10 hours per day; there is no law for men.

This is only a small concern, but paying well. They make mostly Lenos, 10 x 10, 28's and 28's. 24 looms to a weaver, 58 ins. wide. Of 40-in. goods they have 32 looms to a weaver.

This mill gives preference to the Stafford shuttle-changing loom.

There were 16 plain looms to a weaver; 30 x 27, 28's and 26's, 44 ins., 40 yards; 44 x 40, 20's and 25's, 44 ins., 40 yards; the secret was large weft bobbins; 36's would last 25 minutes, 28's would last 27 minutes, making 150 picks per minute.

The beams were stored in an upright position, the end of the shaft fitting in a moveable piece of pipe.

Leesona winding, Saco-Lowell fast-warping mill, 330 yards per minute.

In the ring-spinning room one tenter looked after 5 x 240 spindles, earning \$28.00.

The spinning department has Whitin frames, front roller revolutions per minute, 116 for warp and 142 weft, both 28's, 7 ins. lift, 1½ ins. weft ring, 1½ ins. warp ring; doff three times in 20 hours.

The average wage in the weaving mill was \$35.00; in the spinning mill \$18.00.

The multiple system was introduced five years ago.

They work 10 hours per day and 10 at night. Stop Saturday at noon, other days 7 to 6, with one hour for lunch.

The Saco-Lowell people mentioned one mill with 20,000 spindles spinning 20's on 2½ ins. ring with 7½ ins. lift; spindle speed, 8,100 per minute, employing 32 operatives, each tenter having 24 sides × 114 spindles.

#### MILL No. 7 (South).

An intimate friend of mine has recently remodelled the mill organization of one of his mills in Alabama. He produces sheetings for 50½ ins. 42 × 40, 5-10 yards per lb., 26's warp, 29's weft. Formerly he had 18 looms to one weaver; now 48. The loom makes 149 picks per minute; efficiency about 94 per cent. He uses a coarser reed and a bigger bobbin. My friend is confident that he will get to 65 looms per weaver when he has eliminated the less-efficient men and when he has introduced all the technical alterations. The length of pieces is 650 yards; the selvage is trimmed with a blow-pipe whilst the piece is on the roll, this operation taking only a few seconds. His looms are 54-in. "Draper" Model "E."

The average loom stops per hour is 0.4. The cotton used is ¾ in. (American staple length) average middling.

The output of 380 looms per year is 35,000,000 yards; the mill starts on Monday morning at 5.45 a.m., and stops only on Saturday at 11.30 midday. During that time the machines never stop, not even during meal times.

The battery filler gets \$10.50 per 60 hours, the weaver \$23, average pay on piecework. This includes a bonus of 15 per cent. for quality weaving, i.e., if not cut. The tackler looks after 65 looms.

In my friend's ring-spinning mill 20,000 spindles produce the yarns for the above sheeting; one ring tenter looks after 10 sides of 240 spindles, and he is constantly increasing that number of spindles per operative: of course, there are cleaners, etc.

The front rollers for 26's, being 1 in., average 125 revolutions per minute, 9,330 revolutions per spindle, double roving, 8 of a draft for weft, 12 for warp yarns. The same cotton is used for both weft and warp ¾ in. average middling.

4.60 hanks double-roving, warp, draft 12.

3.75 hanks single-roving, weft, draft 8.

This desire for lower cost of production has been recently cultivated to a fine science in America, forced upon the manufacturer by the bad times. Just as in England you have chartered accountants to check the books of most business concerns, and to advise on improved methods; so it has become a recognized custom in U.S.A., at least amongst the more advanced cotton manufacturers, to call in specialists in mill engineering, in cotton, carding, spinning and weaving. My Alabama friend called in the Textile Development Company, 80, Federal Street, Boston, Mass.; he paid them \$2,000 per week and expenses. In 14 days they had examined everything, one expert in each department, and the whole cost was \$5,000. He has saved at least \$15,000, and confidently expects that every year he will eventually save \$40,000. Just as every bookkeeper thinks he has nothing to learn from a chartered accountant, so does every mill manager and foreman think he knows everything; but evidently most of them are mistaken. I have heard of dozens of mills where a mill advisory firm has been employed with great success.

MILL No. 8 (South).

Details of Plant in One of the Mills in the Southern States of U.S.A.  
Work carried out per Operative, Cost, etc.

Spindles, 20,000 ; looms, 430.

OPENING--PICKING--CARDING--ROVING.

Position	No. of machines	Rate per hr. \$	Hanks made 60 hours \$	Total wages 60 hours	Duties
1 Overseer .. ..	—	—	—	—	
1 Grinder .. ..	62	.33	—	19.80	To do tackling work on opening and waste machines, pickers, 44 cards and grind.
1 Helper .. ..	—	.17	—	10.20	To help around drawings and oil all cards ; to assist in doffing full cans from cards.
1 Waste-machine man	3	.20	—	12.00	To run 3 waste machines, and assist man running opening machines
1 Opener man ..	12	.20	—	12.00	To run opening machine, oil and clean.
2 Picker men ..	5	.28	—	33.60	1 man to take care of 2 breakers, doff laps on them and to feed laps to 3 finisher pickers ; 1 man to doff laps on 3 finisher pickers and put them on elevator to card room. Both men clean their machines.
2 Card tenters ..	43	.24	—	28.80	1 man to take care of 23 cards, the other 22, to put their laps on cards, to clean and oil, but will only doff cans from the 18 cards that are put in the present picker room.
2 Card strippers ..	43	1 .24 1 .20	—	14.40	To strip 3 times daily on 43 cards, to pick up notes and fly, to sweep 3 times daily oil hangers, and to clean oiler heads.
3 Drawing tenters ..	10	.20	—	36.00	1 man to put in card sliver for 30 del. of breaker drawings, and to assist in doffing cans from cards ; 1 man to doff cans from 30 del. of breaker drawings and to creel in on the back of 30 del. of finisher drawings ; 1 man to doff cans from 30 del. of finisher drawings and to put them back of slubbers.
2 Slubber tenters ..	4	per hk. 1 .15 1 .135	110 123	16.50 16.60	
3 Intermediate tenters } 1/2 " " "	7	.15	430	64.50	
6 Fine frame tenters } 1/3 " " "	19	.13	826	107.38	To run 3 machines each.
2 Doffers .. ..	18	per hr. .15	—	18.00	To run 1 fine frame and 1 intermediate.
1 Roving man ..	26	.22	—	13.20	To doff on all fine frames and help in general cleaning.
1 Roving marker ..	26	.18	—	10.80	
1 Oiler .. ..	38	.24	—	14.40	To oil slubbers, intermediates, fine frames, drawings, hangers and to brush down.
2 Sweepers .. ..	—	.12	—	14.40	
1 One Section man ..	38	.32	—	19.20	To overhaul, scour drawings, 1 fine frame, intermediate and slubber each week, to fix on 10 drawings, 4 slubbers, 7 intermediates and 19 fine frames.
1 Two .. ..	—	.30	—	18.00	

\$491.78

# Automatic Looms? ....

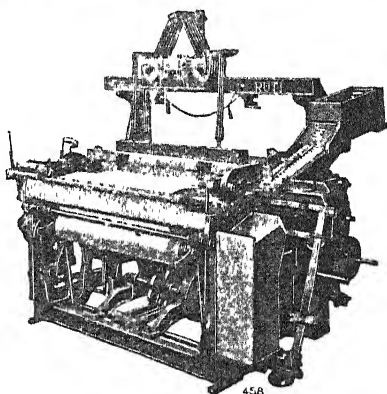
## Yes, but RUTI ones!

*SINCE 1899 we have supplied more than 34,000 One Shuttle (Northrop and Steinen) and 1,900 More Shuttle Automatic Looms. This is YOUR security as well as ours.*

### RUTI MACHINERY WORKS

Ateliers de Construction Ruti  
Succession de Gaspard, Honegger

RUTI (Zurich), SWITZERLAND



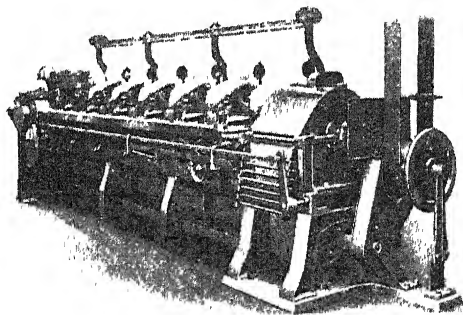
Looms and Weaving Machines for Silk, Cotton, Linen, etc.  
Automatic Looms. Dobbies and Jacquard Machines.

## ASA LEES & Co. LTD

SOHO IRON WORKS, OLDHAM

*Makers of All Kinds of Machinery*

FOR PREPARING, COMBING, SPINNING AND  
DOUBLING COTTON, WOOL, WORSTED, &c.



IMPROVED COMBER, NASMITH TYPE

# *Reduce your Costs!*

IN this issue some details are contained which show how and why our competitors are beating us. : :

In the majority of cases **HIGHER PRODUCTIVE** capacity and **LABOUR-SAVING** Machinery are involved.

Preparation of yarn for weaving is a process which, hitherto, has been non-profit producing, but a necessary evil.

In order to convert these processes into profit-earning, it would be well for you to investigate very closely—

## **BARBER-COLMAN WARP-TYING MACHINES**

for Tying-in instead of Twisting-in  
Warps.

**WARP DRAWING-IN  
MACHINES** for drawing-in up to  
8 shafts.

**HAND KNOTTERS** for  
Winders.

*also* **AUTOMATIC WINDERS and  
HIGH SPEED WARPERS**

Which reduce cost of Winding and  
Warping approximately  $\frac{1}{2}$ d. per lb.

## *Barber & Colman, Ltd.*

Moresland Road, Brooklands,  
**MANCHESTER**

### NUMBER OF MACHINES—SPEEDS—PRODUCTION.

SPINNING.		R.M.P. Front					
Yarn No	Spindle speed	roll speed	lbs. yarn	lbs. per spindle	No. of spindles	Back stock	Efficiency percentage
26's warp ..	.. 9,000	117	31,200	3.20	9,752	4.40	92
29's filling ..	.. 8,200	124	28,480	3.04	9,378	4.40	92

FLY FRAMES.	59,680	19,120
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Fine Hank Roving	Single or double	R.P.M. spindle	Front roll speed	lbs. yarn	lbs. per spindle	No. of spindles	Back stock	Efficiency percentage
4-40 (warp) . .	Double	1,200	116	60,881	20-86	2,918	1-25	91
Intermediate 1-25 . .	..	850	143	61,490	90-63	678	-47	82
Slubbers. -47 ..	..	625	185	62,105	289	214	-73 gr.	76

### FINISHER DRAWING.

FRISKING DRAWING.						Front roll speed	lbs. per delivery	No. of deliveries	Back stock	Efficiency percentage
Gram Sliver						250	2,327	27	72 gr.	75
Breaker Drawing.						250	2,295	27	56 gr.	75
Cards						Doffer speed	lbs. per card			
56	..	..	..	..	..	10.6	1,520	42	13.5 oz.	90
Finisher Pickers.										
						R.P.M.	Blows beater speed	lbs. per picker	No. of machines	Efficiency percentage
13.5 oz. lap	..	..	..	..	..	800	50	28,000	2	75

SPINNING ROOM.

No.	Position	Rate per week	Total wages
		\$	\$
1	Overseer .. .. .	—	—
1	Section man on warp .. .. .	21.62	21.62
2	„ „ filling .. .. .	20.96 ca.	41.92
1	Overhauler .. .. .	22.72	22.72
2	Overhaulers and banders .. .. .	16.38 ca.	32.76
2	Roving haulers .. .. .	10.48 ca.	20.96
3	Sweepers .. .. .	7.60 ca.	22.80
1	Waste picker .. .. .	3.28	3.28
1	Oull cleaner .. .. .	10.48	10.48
1	Bobbin cleaner .. .. .	10.48	10.48
1	Rewinder .. .. .	10.48	10.48
1	Band boy .. .. .	6.55	6.55
1	Roller coverer .. .. .	18.34	18.34
10	Doffers .. .. .	16.38 ca.	163.80

The night help receive a 10 per cent. bonus in addition to the above wages.

## DAY RUN.

[illegible]

## CLOTH INSPECTION AND BALING.

60 hours.				
Position	No of hands	Wages per week \$	Duties	
Overseer .. ..	1	—	Supervisor of cloth room operation and help.	
Brusher .. ..	1	14.40	Operates brushing machine and sews cloth into large rolls.	
Balers .. ..	2	14.40	Make up all rolls for shipment, wrap rolls and stencil them.	
Singer .. ..	1	14.40	Singes cloth and trucks rolls to store-house.	
Stitcher men ..				
Roll doffer .. ..	1	14.40	Doffs rolls for girls, bags up rags once a week, also oils shafting hangers.	
Inspectors .. ..	8	12.00	Burl and inspect cloth.	
Cost, \$232.80				
Runs day only 60 hours				
About 58,000 lbs. or 260,000 yds. cloth.				

## SPOOLERS (500 Spindles).

60 hours.			
Position	No. of hands	Wages per week \$	
Section man ..	1	18.00	
Yarn man .. ..	1	12.00	
Spoolers .. ..	10	12.92 each	(average wage as on piece-work basis).

## WARPERS (7 Warpers).

60 hours.				
Position	No. of hands	Wages per week \$		
Warper tenters ..	2	15.60 ea.		
Creelers ..	2	13.65 ea.		
About 60,000 lbs. per week.				
Day—60 hours per week.				
Night—57½ hours per week.				
Night operators receive 10 per cent. extra over the above rates.				
Position	No. o hands	Wages per week		
		Day run \$	Night run \$	
Slasher man ..	1	21.60	21.60	Operates slashers.
Helper ..	1	15.00	15.00	Mixes size, helps slasher man put on sets and doffs beams.

The day run is figured on a 60-hour week.

The night run is figured on a 57-hour week.

All night help receive 10 per cent. in addition to the weekly wage.

2 slashers.

## LABOUR

No. of looms	Style	Yds. per lb.	Speed of looms	Cuts per loom per week	Cuts per % Eff.	No. of looms per fixer	No. of looms per weaver	No. of looms per battery hand	No. of pick-out or smash hands	Price per cut				Cost per week \$
										Fixers	Weavers	Smash hands	Battery hands	Total
										\$	\$	\$	\$	\$
210	Plain 50½-42 × 42	5.10	149	6.74	1362	94	86	43	86	.0431	.0776	.0253	.0362	1827 248.84
144	" 57-42 × 42	4.52	133	6.00	861	94	86	43	86	.0484	.0872	.0290	.0407	2053 182.31
32	" 60½-46 × 54	3.40	133	4.68	149	94	86	43	86	.0606	.1090	.0363	.0509	2568 38.26
44	" 60½-64 × 64	2.60	133	3.95	174	94	86	43	86	.0735	.1324	.0441	.0615	3118 54.25
<hr/>														
430										2,549				523.66
<hr/>														
Cost per loom per week for weaving										..			\$ .5281	
" " " fixing ..										..			.2934	
" " " battery hands													.2464	
" " " smash hands ..													.1760	
Total cost ..										..			\$1.2439	
Total weaving cost per week										..			\$523.660	

## WEAVING LABOUR ORGANIZATION.

440 looms.

Day run—60 hours per week.

Position	No. of hands	Wages per week \$	Duties
Overseer .. ..	1		Has general supervision of weaving and slashing operations and help
Fixers .. ..	5	25.00	Fix looms, take out leases and put in warps.
Smash hands .. ..	5	15.00	Mend in all smashes and start up new warps after fixers.
Filling men .. ..	2	9.60	Put filling up at looms.
Quill men .. ..	2	9.60	Pick up empty quills and take them to spinning room.
Loom cleaners .. ..	3	12.00	Clean looms, sweep floors and take care of waste
Shaft man .. ..	1	9.60	Does all oiling on hangers for shafting, and also does all overhead cleaning.
Loom oiler .. ..	1	9.60	Oils all looms.
Janitor .. ..	1	7.20	Looks after cleanliness of sink room, toilets and spare floor spaces.
Weavers .. ..	10	22.50	Weave, mend in broken yarn, and start looms, weave at back of looms
Battery girls .. ..	10	10.50	Put filling in batteries for weavers.
Cloth boy .. ..	1	12.50	Takes off cloth for weavers and delivers it to cloth room.
Lease-out man .. ..	1	18.50	Takes out leases when warps run out, brings new warps and puts them back on looms for fixers.

A bonus of 5 per cent. is paid for production.

A bonus of 10 per cent. is paid for quality.

## COST—DOLLARS PER LB.

Process	Burden	Labour
Opening and Picking .. ..	0.00282	0.00197
Cards and drawing .. ..	0.00659	0.00434
Slubbers .. ..	0.00131	0.00249
Intermediates .. ..	0.00219	0.00423
Roving .. ..	0.00526	0.00765
Spinning warp .. ..	0.02267	0.02195
Spinning weft .. ..	0.03007	0.03533
Spooling .. ..	0.00373	0.00924
Warping .. ..	0.00251	0.00438
Slashing .. ..	0.00526	0.00309
Drawing-in .. ..	0.00136	0.00288
Total warp—Burden .. ..	0.06656	
Labour .. ..	0.07578	
		0.14234
Total weft—Burden .. ..	0.05570	
Labour .. ..	0.06092	
		0.11662

## BURDEN IN DOLLARS PER LB.

Depreciation .. ..	0.01975
Heat and humidity .. ..	0.00224
Insurance .. ..	0.00259
Light and power .. ..	0.01558
Repairs .. ..	0.01272
Supplies .. ..	0.00450
Taxes .. ..	0.00533
Mill Expense .. ..	0.00152
Motor truck .. ..	0.00085
Property, Plant and Maintenance .. ..	0.00072
Shipping and Warehousing .. ..	0.00111
Super. and Clerical .. ..	0.00650
Village Maintenance .. ..	0.00019

## MILL No. 9 (South).

The mill belongs to a Company which has its principal mills in the North. It was an experiment to find out whether the South has really a great advantage over the North. The experiment has definitely proved the advantage.

This mill makes a good many cloths for export. We saw jeans, drills and sheetings packed in trusses, marked for shipment to Zanzibar, Madras, Calcutta, Bombay, Karachi, and several South and Central American Republics.

The mill has 23,000 spindles, average 15's twist, and 800 looms, with 35 ins. to 44 ins. reed space. All looms had "Draper" feeler motion, welt-fork stop.

Working hours in this State are 60 per week, night work only in section of card room.

Present production, wages paid, staffing of machines are given in the following statement :—

## LABOUR COSTS :

OPENING AND PICKING.				Hands	Hours	Total Wages
Cotton openers	..	..	..	1	52	\$9.10
Waste men	..	..	..	1	55	9.65
Fixers..	..	..	..	1	68	15.30
Picker hands	..	..	..	3	189	35.20
Sweeper	..	..	..	1	60	6.05
				7		\$75.30

Total production : 82,447 lbs. Cost per lb. : Cents 0.0713.

CARD ROOM.				Hands	Hours	Total Wages
Overseers	..	..	..	1	60	\$50.00
Second hand	..	..	..	1	60	25.00
Section hands	..	..	..	2	114	31.50
Grinders	..	..	..	2	120	42.00
Card hands	..	..	..	5	295	67.80
Card strippers	..	..	..	4	238	56.25
Drawing	..	..	..	5	284	56.05
Slubbers	..	..	..	4	253	87.80
Roving frames	..	..	..	13	753	203.60
Roving men	..	..	..	1	72	14.30
Oilers	..	..	..	1	60	12.00
Sweepers	..	..	..	2	118	11.80
General help	..	..	..	3	176	38.70
				44		\$696.80

Total production : 79,185 lbs. Cost per lb. : Cents 0.8800.

SPINNING ROOM.				Hands	Hours	Total Wages
Overseers	..	..	..	1	60	\$50.00
Second hand	..	..	..	1	60	25.00
Section hands	..	..	..	4	244	75.00
Oilers	..	..	..	3	152	31.50
Banders	..	..	..	2	123	25.85
Roving men	..	..	..	4	242	42.65
Head doffer	..	..	..	1	60	15.00
Warp doffers	..	..	..	5	300	68.05
Filling doffers	..	..	..	15	899	173.70
Warp spinners	..	..	..	20	1,206	199.00
Filling spinners	..	..	..	13	750	152.85
Sweepers	..	..	..	4	233	26.35
General help	..	..	..	4	245	47.55
				77		\$933.40

Total production : 78,333 lbs. Cost per lb. : Cents 1.1916.

# REPORT ON 1928 JOURNEY THROUGH U.S.A.

115

SPOOLERS				Hands	Hours	Total Wages
Section man	..	..	..	1	67	\$20.10
Spoolers	..	..	..	12	695	131.10
Tangle yarn, hand	..	..	..	1	54	10.80
Yarn man	..	..	..	1	56	11.20
Sweeper	..	..	..	1	61	6.10
				<u>16</u>		<u>\$179.30</u>

Total production: 42,537 lbs. Cost per lb. Cents 0.4215

WARPING.				Hands	Hours	Total Wages
Warpers	..	..	..	2	110	\$25.30
Creelers	..	..	..	4	220	44.00
Beam men	..	..	..	4	230	41.40
General help	..	..	..	1	60	9.90
				<u>11</u>		<u>\$120.60</u>

Total production: 43,852 lbs Cost per lb: Cents 0.2750

SLASHING AND DRAWING IN.				Hands	Hours	Total Wages
Slashers tenders	..	..	..	2	171	\$58.55
Slasher helpers	..	..	..	1	83	20.75
Tying-in men	..	..	..	2	128	40.15
Tying-in helpers	..	..	..	1	55	11.00
Drawing-in hands	..	..	..	5	300	64.10
				<u>11</u>		<u>\$194.55</u>

Total production: 54,371 lbs. Cost per lb.: Cents 0.3578.

WEAVING.				Hands	Hours	Total Wages
Overseer	..	..	..	1	60	\$50.00
Second hands	..	..	..	2	82	36.00
Loom fixers	..	..	..	10	589	210.35
Weavers	..	..	..	28	1,698	477.25
Smash hands	..	..	..	4	251	51.40
Warp men	..	..	..	4	245	64.40
Battery hands	..	..	..	18	1,111	211.50
Filling men	..	..	..	2	120	19.80
Quill men	..	..	..	10	585	75.00
Loom cleaners	..	..	..	4	230	38.05
Oiler	..	..	..	1	60	12.00
Sweepers	..	..	..	3	180	18.00
General help	..	..	..	8	480	102.00
				<u>95</u>		<u>\$1,365.75</u>

Total production: 82,564 lbs. Cost per lb.: Cents 1.6542.

CLOTH ROOM.			Hands		Hours		Total Wages
Overser	..	..	1	..	60	..	\$35.00
Cloth checker	..	..	1	..	65	..	21.15
Calender hand	..	..	1	..	67	..	16.10
Head inspector	..	..	1	..	62	..	18.60
Inspectors	..	..	8	..	502	..	80.35
Balers	..	..	1	..	60	..	14.10
Sewers	..	..	1	..	60	..	13.80
Branders	..	..	1	..	65	..	15.25
Stitchers	..	..	1	..	60	..	10.20
Folders	..	..	2	..	134	..	31.50
Sweeper	..	..	1	..	60	..	10.50
General help	..	..	2	..	134	..	31.50
			<u>21</u>				<u>\$298.05</u>

Total production : 73,730 lbs.      Cost per lb. : Cents 0.4042.

Total productive operatives, 282. Total wages, \$3,863.75. Labour cost per pound, based on weave-room production, cents 4.6797      2.3398 pence.

GENERAL.			Hands		Hours		Total Wages
Repair dept.	..	..	9	..	561	..	\$195.75
Watchmen	..	..	2	..	169	..	28.75
Firemen	..	..	1	..	85	..	17.00
Warehouse	..	..	2	..	124	..	32.80
Yard	..	..	15	..	827	..	188.35
Supply room	..	..	2	..	103	..	25.10
Shipping	..	..	3	..	165	..	28.80
Scrubbing	..	..	5	..	280	..	55.25
Sale waste	..	..	2	..	124	..	17.20
Miscellaneous	..	..	6	..	379	..	91.60
			<u>47</u>				<u>680.60</u>

Less items as listed below      ..      ..      ..      300.80

\$379.80

Cost per lb. : Cents 4.599

Total manufacturing pay roll : 329.      Total wages : Dollars 4,243.50.  
Labour cost per lb., based on weave room production :

Cents 5.1396      2.5698 pence.

Hours run : 60.      No. of spindles run : 21,775 average.

		Yarns		Spindles (average)
Pounds production baled	73,730	..	13.50 Warp	.. 2,589
Yards production baled	196,876	..	22.00 Warp	.. 1,248
Average number yarn	14.895's	..	13.20 Weft	.. 2,947
			10.60 "	.. 381
			14.20 "	.. 485
			14.71 "	.. 416
			11.93 "	.. 901
			16.00 "	.. 1,040
			16.25 "	.. 208
			7.75 "	.. 104
			28.00 "	.. 1,456

For both warp and weft they have, on an average, one tenter to 832 spindles, which is very low; they earn \$12.00 for 60 hours; do their own cleaning and creeling.

Warp, 2 ins. ring;  $7\frac{1}{2}$  ins. traverse. Weft,  $1\frac{1}{2}$  ins. ring;  $8\frac{1}{2}$  ins. traverse.

Cards: Four breakers, 6 finishers; three men and one tackler; all black men in this room. Wages,  $17\frac{1}{2}$  cents per hour; the tackler gets 20 cents.

Only in the blowing room and in the dyehouse are blacks working. The sweeping of the mills in the South is done by black people.

96 cards, four card hands; wage, 1 cent per card per hour; take off cans. One lap man, 23 cents per hour; two grinders, 35 cents per hour; two strippers. One overseer to whole card room; pay \$50.00 for 60 hours and free house.

*Winding.* 75 spindles per winder; \$12.00 for 60 hours.

*Warper Mills.* Two tenters to nine machines (one four and other five machines); 20 cents per hour. Four creeler hands, same speed of warping mills as in Lancashire.

*Slashers.* One man each, 25 to 33 cents per hour. One foreman slasher and tying-in, \$30.00 per week of 60 hours.

Weaving overseer, \$50.00. Two second hands, one \$25.00 and the other \$30.00.

The spinning overseer looks after spinning, spooling and warping; he has only one second hand, \$50.00. One spooling and warping tackler.

*Kinds of Goods Made.* Jeans,  $96 \times 64$ ; drills  $72 \times 84$ ,  $72 \times 50$ ,  $80 \times 48$ ; twills,  $86 \times 58$ ,  $88 \times 40$ ,  $88 \times 38$ ,  $94 \times 42$ .

The jeans are being sold in the Far East. They allowed us to see the costing calculations of these, viz.,  $72 \times 48$ ,  $13\frac{1}{2}$ 's  $\times 13\frac{1}{2}$ 's, with cotton at 20 cents per yard to produce this cloth (=6.38d. per yard).

The drills have  $13\frac{1}{2}$ 's warp, and weft anything from 7's to 19's.

For *depreciation and upkeep* they calculate \$1.50 per year per spindle. For all taxes they reckon 28 cents per spindle.

At the present time they do not pay taxes; they were given five years' exemption of taxes. When that time expires they will have to pay 35 cents in all. The town bought 400 acres of land and presented it to the Company when they started the mill (value about \$5,000).

A four-roomed house for the operatives, all frame houses, very neat, costs \$1,600 to construct. Rent per room, 75 cents per month.

*Loom Efficiency:* 90 per cent.; the looms work 20 minutes during dinner hour; 160 picks, 34 ins.; 165 picks, 30 ins. (They found that this speed pays best.)

The seconds amount to 3 per cent. or 4 per cent.

All goods made for export are sent first the very long distance to New York, and they are shipped from there to all parts of the world. The bales had mostly hemp ropes in place of the usual iron hoops. Each bale was marked "American Manufacture." In view of the nearness of the factory to New Orleans and the Panama Canal, it seems a waste of money to forward the ready-packed bales first to New York.

#### MILL No. 10 (South).

The welfare work is the outstanding feature, swimming pools, Y.M.C.A., Y.W.C.A.

There are about 8,000 operatives employed in the 10 establishments of the firm. There is a profit-sharing system in force.

If any operative has not been absent for more than two weeks in the year he gets a paid holiday.

Fifty-five hours per week. Half-timers. Anyone two minutes late is locked out.

The Company has 2,000 houses. Nobody who belongs to a union is allowed to live in a Company's house.

College students come to work in the mill during vacations. Quite 65 per cent. of all students in the South earn some kind of living. The students learn in that way what manual work means. The girls of the University act as waitresses.

This mill turns out heavy goods, moleskins for motor cars, etc. With the exception of a few Crompton-Knowles box looms all were Diaper looms with well fork stop and feeder motion.

Efficiency, 88 to 90 per cent. As many as 30 looms to a weaver, and as few as 8.

The upkeep on these heavy goods was given as \$2.00 to \$2.50 per month per loom. The selvedge, as usual, was burnt off by a blow pipe.

In this mill they were dyeing the raw cotton, and they calculate

Sulphur black	...	.	..	3 cents.
Labour	...	..	.	$\frac{1}{2}$ "
Waste	..	..	...	1 $\frac{1}{2}$ "
Total about				5 cents per lb.

Negro labour is employed in the dye-house.

The black yarn is used for making grandville doubled yarn.

They seemed proud of having introduced *New Usages for Cotton*. They have started new sections for :--

Tubular bags, an open-weave bag, canvas structure; principally used by laundries.

In another place they made baskets of Osnaburgs by stretching the tubular cloth over iron or steel frames. These were used in the mill and are sold to other mills for doffing purposes, etc.

The *Chenille Rug Department* interested me. They said that it had proved to be a paying proposition. They make rugs which are entirely cotton and costing as much as \$7.50 retail. The mill sells these rugs to stores and shops and avoids converters' profits. The chenille yarn is made by cutting a loosely woven cloth warpway. There was one man to each loom.

In a mill of this company they had high-speed doubling spindles (3,000 revolutions per minute, and some at 2,400 revolutions per minute), 4 $\frac{1}{2}$  ins. ring.

They specialize in this mill on ducks and Osnaburgs, the former being a cloth made with 2, 4 and 6 ply yarn, whilst the latter consists of single yarn; both plain weaves.

In the weaving of these heavy goods they used a 22 in. shuttle, inside corrugated, with a strap over the bobbin; four looms to a weaver; 84 ins. to 72 ins. wide.

Cloth Rolls : 300 yards, weighing 800 lbs. were on one roll of the ducks.

600 yards, weighing about 755 lbs., were on one roll of the Osnaburgs.

The spinning frames were peculiar in so far that the towing bobbins were hanging down from a ball-bearing holder, and not in any way fastened at the bottom. These ball bearing holders are made by the Eclipse Textile Devices, Inc., Elmira, New York, and cost only 20 cents each. They reduce friction, and were said to be well worth the money.

They were getting ball-bearing sets for the flyer frames from the Société Franco-Alsacienne, Mulhouse; the spindle rests on three balls a simple contrivance costing 20 cents per spindle.

Owing to the extensive welfare work, wages at these mills are slightly lower than in other parts of the State.

#### MILL No. 11 (South).

60,000 spindles, 1,570 looms, Draper, produce 15,000,000 yards cloth; 12 looms per weaver, coarse weft, but up to 20 looms per weaver. Weavers fill their own batteries, earning \$16.00 to \$18.00 per week. Cloth produced : 36 ins. to 72 ins., drills, twills, sheetings and sateens. 750 operatives; only one shift.

In this mill they have an automatic cleaner travelling over the ring frames, with two arms, blowing compressed air; the whole apparatus hanging from a rail on the ceiling. It was called Buchanan Auto-cleaner, made by Firth, Smith & Co., Boston. They like this apparatus, and are equipping the whole mill with it. The manager told us that this apparatus allowed a girl to look after two additional sides.

Weaving room humidity, 85° (outside temperature, over 90°). One ring-frame tenter looks after 12 × 120 spindles.

In their welfare work they had a nursery where mothers could leave their children, paying 10 cents per day.

330 houses belong to the mill; the rent was 40 cents per room per week. Average, four rooms—electric light, sewer, hot and cold water, but no bathroom.

They spin 3's to 30's weft; 14's to 26's twist.

Weavers' wage \$16.00 to \$18.00 per 57 hours.

The workpeople looked neat and well dressed. They were stated to be saving and taking up shares in the Company on the instalment system.

#### MILL No. 12 (South).

Cloths made: Fancy shirtings, voiles, silk and cotton. Cotton used, 1½ ins. Pima.

Up to 12 looms per weaver of cloth with 30 shafts; different boxes.

No extra wage for artificial silk. The manager works out what production should be and fixes the wage rate. Weavers earn about \$22.00.

Efficiency, 77 per cent. on Crompton-Knowles box looms; 80 per cent. on Draper looms. 2/100's is being used here.

In the combing they take out 16 per cent. waste, altogether 30 per cent. waste from 1½ ins. to 1¾ ins. Pima. Combers receive \$17.00 to \$18.00. Tacklers, 75 to 100 looms, \$27.00.

Carding and spinning are the only departments which work at night, 50 per cent.

52,864 spindles spinning 55/60's average go up to 100's. Celanese and viscose are being extensively used.

2,070 Draper looms; jacquards gave some trouble; Draper looms satisfied; for artificial silk put band inside the magazine; use midget feeler.

Ring tenter, 14 to 16 sides × 112 spindles per operative.

They buy practically all their requirements of cotton in September and October.

Sell 5 per cent. commission and 3 per cent. credit guarantee.

We have never seen any gassing in any of the mills in U.S.A., though the process is known.

#### MILL No. 13 (South).

In South Carolina working hours for female labour are fixed at 55 per week, and no work in meal times is allowed; but whilst we were there girls came in 20 minutes before time and prepared work—doffing, creeling.

75° to 80° humidity.

The Franklin process of cheese dyeing was used (i.e., a steel spring with canvas stocking inside each cheese).

Spinning, 12 to 18 sides × 128 spindles per tenter.

50,000 spindles day and night shift. 1,800 looms, of which 736 were Draper automatic, and balance Crompton-Knowles box looms.

100's. 12-hank bobbins.

Waste in combing, 16 per cent. white cotton, 18 per cent. Pima cotton.

All fine goods, similar to previously described mill (No. 12).

Up to 16 looms per weaver.

"Whitin" cleaning, opening and blowing machinery.

MILL No. 14 (South)

## The Ultra-Modern Cotton Mill of Chicopee (near Gainesville, Georgia).

The Chicopee Manufacturing Corporation of Georgia, Chicopee, is a firm solely producing products for sanitary purposes, and therefore they have been lavish in expending money in order to provide every kind of cleanly safeguard.

The mill is situated about  $3\frac{1}{2}$  miles from Gainesville, a town of 12,000 inhabitants; 3,500 acres of an old plantation were bought by the company, and this has been transformed into the estate with its mill, nearly one-fifth of a mile long, its village on undulated ground, traversed by many tar-macadamed roads (where four motor-cars can travel abreast); there are some experimental farms, an own water reservoir, etc., of which I shall speak later.

The mill building is a long, flat, brick construction, relieved here and there with white-enamel tiled borders, but very little brick is visible; the main impression is windows from top to bottom, endless rows of them. A green lawn extending all along the building matches the brick building. The main building is a shed, but not with a saw-toothed roof, but flat, with the centre portion raised, and light is allowed to enter also from where the two sections of the roof meet. Only the warehouse at the end of the main building has two stories.

In the power-house there are oil-burning boilers, solely for the purpose of heating the mill and for slashing. Electric power at 1 cent per kilowatt is supplied by the Georgia Light and Power Station, which generates its power by water, but maintains a large steam-power unit as a safeguard in case of drought.

The machine shop building occupies 20,000 square feet of floor space, including also the offices, supply stores and switchboards.

There are six entrance towers to the main mill building, in which are situated the toilet facilities, cloak and dressing rooms for men and women. Here the operatives change into working uniforms, which are washed and ironed in the modern laundry of the mill.

As one enters through any of these red brick towers one is surprised at the immensity of the one inside room, covering five acres; it is 17 feet high to the eaves, 954 feet long, 236 feet wide. On this one floor the whole of the output of 42,240 spindles, including warping and slashing, is handled.

It is the only mill, to my knowledge, where the walls are white-enamelled tile; here again cleanliness was the object of the firm. The regiment of windows are glazed with actinic glass, which reduces the glare that is generally a handicap in southern climates; all the window frames are of steel construction.

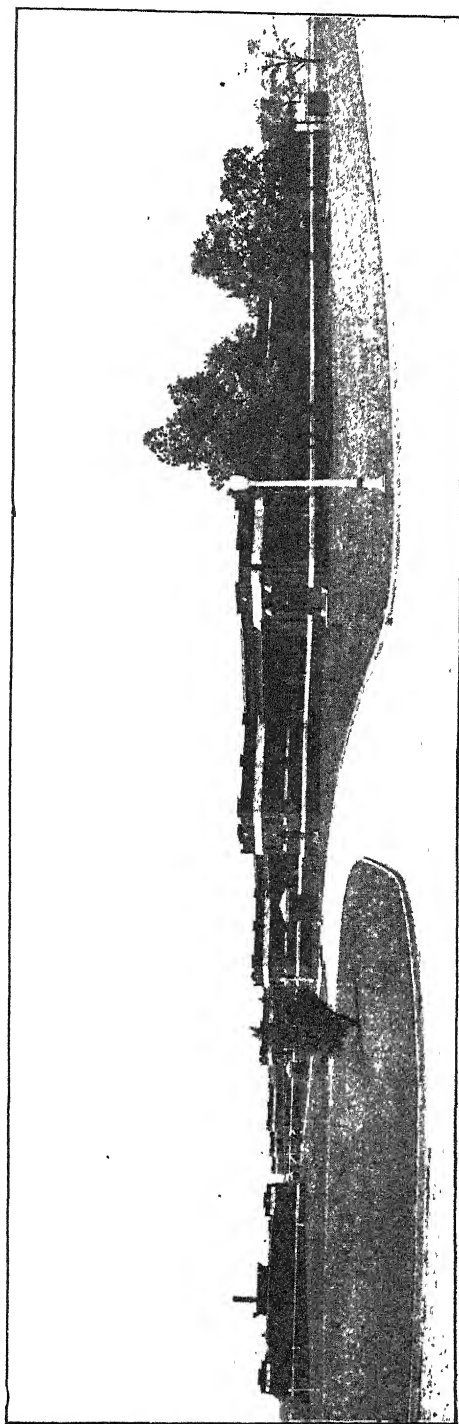
The floors have been constructed of a cinder bed, bonded with asphalt and covered with concrete; on this rest two layers of wood flooring, and a final surface of maple.

The ceilings are painted white, and are insulated by Celotex to keep the mill warm in winter and cool in summer. Yellow pinewood columns support the roof.

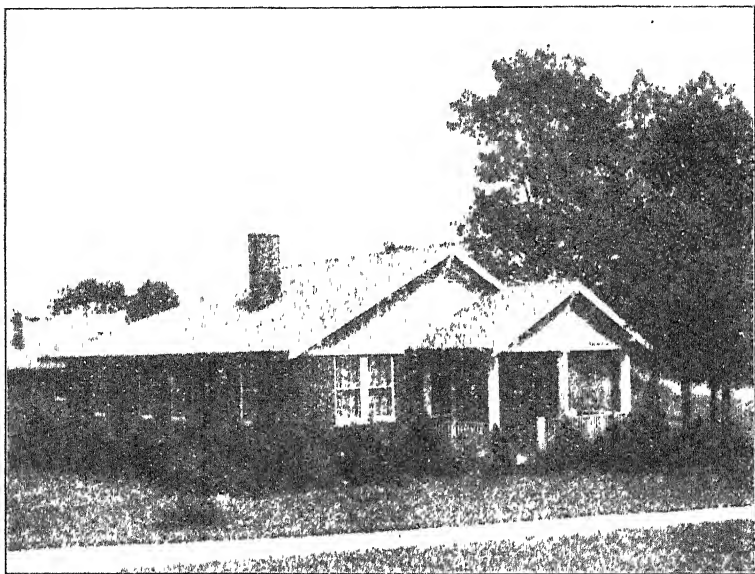
All the main steam pipes and electric feeders run under the floor in tunnels, measuring 2,450 feet, almost half a mile; a railroad runs along this tunnel, which is 6 feet high and perhaps 4 feet wide.

All the operations of the mill being on one level floor, there is no need for hoists; one operation is handed on to the other with the utmost ease.

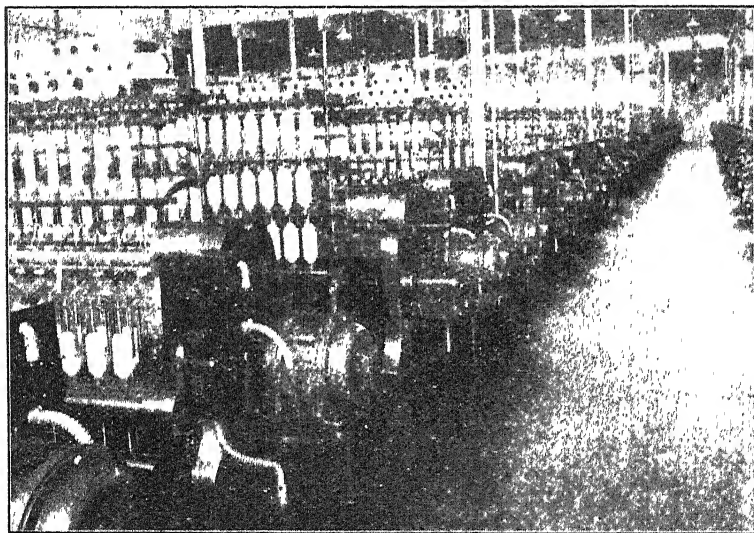
The ground for the building was broken on December 1st, 1926; in less than seven months, on June 15th, 1927, the construction work had been completed and machinery was being put into place, enabling them to start producing within one year that the first sod was turned over.



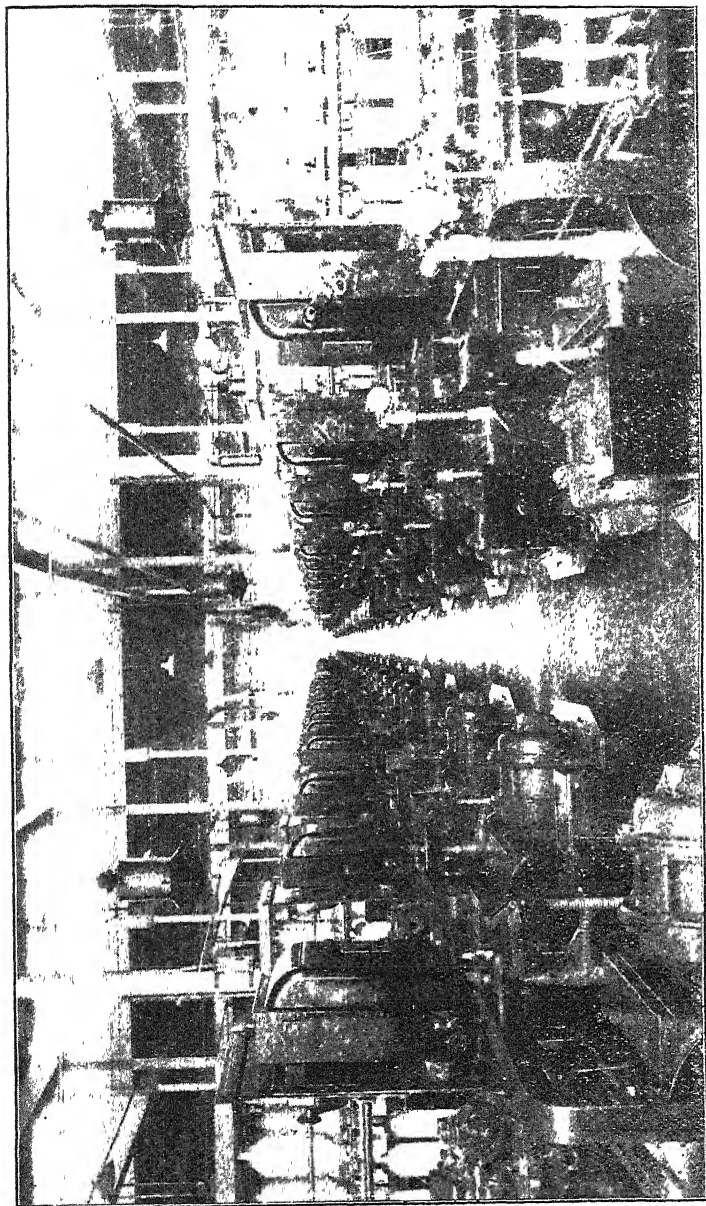
Mill of the Chicopee Manufacturing Co., Gainesville, Ga.



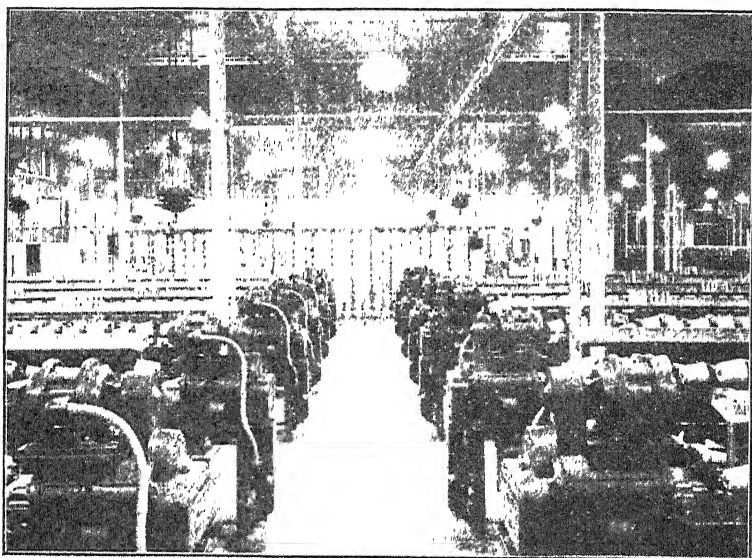
One of the Operatives' four-roomed Houses of the Chicopee Manufacturing Co., Gainesville, Ga., containing living-room, three bed-rooms, kitchen and bath-room



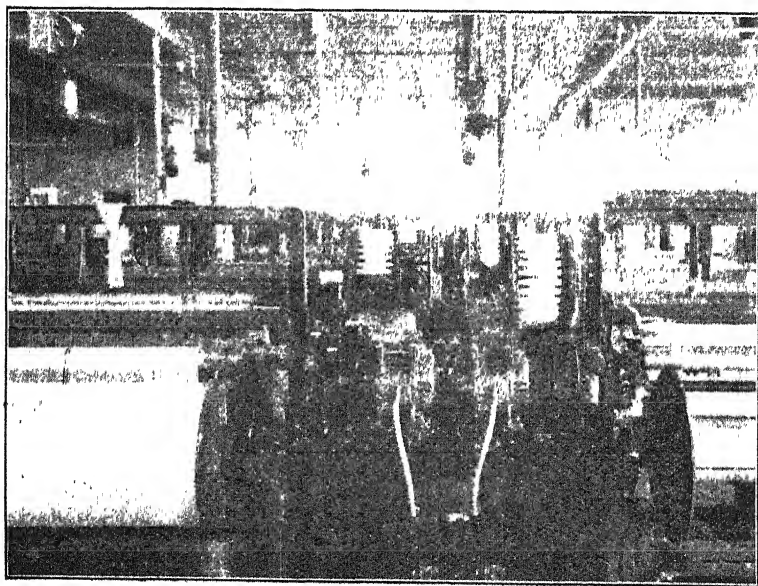
Roving Frames in the Chicopee Manufacturing Co., Gainesville, Ga.



Fales & Jenckes' Spinning Frames in the Chicopee Manufacturing Co., Gainesville, Ga.



Induction Motors, 1,800 r.p.m., individually driving Winders (night view),  
Chicopee Manufacturing Co., Gainesville, Ga.



Draper 40in., Model "K," Looms, Chicopee Manufacturing Co., Gainesville, Ga.

The machinery and equipment used is, of course, of the latest type which American textile machinists can produce. The suppliers were :—

Carding room and drawing room : Saco Lowell Shops.  
 Roving : Woonsocket Machine & Press Co., Inc.  
 Spinning : Fales & Jenks Machinery Co.  
 Winding : Universal Winding Co.  
 Warping : T. C. Entwistle Co.  
 Slashing : Saco Lowell Shops.  
 Looms : Draper Corporation.  
 Cloth-room machinery : Curtis & Marble Machine Co.  
 Transformers, motors, switchboards : General Electric Co.  
 Sprinklers and air conditioning : Guinnell Co., Charlotte, N.C.  
 There are two shifts being worked, each 47½ hours.

#### TECHNICAL NOTES.

Every machine, even the cards, is run by an individual motor. All machinery runs day and night.

Output per week, 95,000 lbs. cloth, averaging 12 yards per pound.

Three automatic openers and five finishers, attended to by three men.

42,240 ring spindles, spinning half 30's twist and half 40's weft yarns from 1 in. to 1 1/32 in. cotton (American standard length) from Arkansas and Oklahoma; 4-64 twist per inch; 54-lea test.

Draft is 5.9 for twist and 7.25 for weft.

Every frame has 264 spindles, 1½ in. and 1¼ in. ring diameter, 6½ in. traverse. Space between frames, 3½ ft.

A girl attends to 12 sides, a boy to 10 sides, but during night the average is 14 sides. Average wage for these operatives works out to 13 to 15 dollars per week of 47½ hours actual time spent in mill.

Labour cost on 30's twist was given as being about 3 cents per pound only.

In the whole mill they employ seven doffers, viz., three on the 21,000 twist spindles and four on the 21,000 weft spindles; wage for doffers, about \$18 per week.

The spindles start with 9,600 revolutions per minute, and run at an average of 10,300 after some yarn has been put on the bobbins; speed of front rollers, 123/127 r.p.m.

Ten Leesona Universal winding frames are used.

The warping mills, by T. G. Entwistle, Lowell, run at 300 yards per minute; the warps are 1,426 ends 30's, 30,000 yards.

4,000 yards on a beam; each beam has 20-in. flanges.

Three Saco Lowell slashers, with extra large drums, were giving satisfaction.

1,000 looms—all Draper's Northrop without feeler motion. Cloth is 40 in. and 42 ins. wide, 20 × 16 and 44 × 40; 30's and 40's; 165 picks per minute. Surgical-bandage cloth is the main production.

One weaver to 90 looms, and one battery filler to the same number of looms; one tackler to 142 looms.

Wages of the weavers average \$12 per week, 10 per cent. extra during night. This rate is paid to any ordinary labourer. For each department there is an overseer, receiving \$50 per week and three section men (foremen) receiving \$21 per week.

Maintenance, power and labour are calculated at 10 cents per pound, reckoning 12 yards cloth to the pound.

The cotton warehouse has storage capacity for 8,000 bales. This ware-

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house is the only two-storied building; it has brick walls inside and ferro-concrete outside; the roof is of wood.

A recreation hall 60 × 100 feet adjoins the warehouse; it has excellent maple flooring. Next to the recreation hall, which is also used for a gymnasium, are a number of shower baths.

The mill starts work at 7 a.m. on Mondays, and the machinery does not stop until noon on Saturday. The operatives are only 47½ hours per shift in the mill; they take their time for meals in sections; thus the lunch interval begins at 11 a.m., whilst some operatives begin their lunch only at 1 p.m. Those who remain in the mill have to give also attention to the machines of the absentees.

There did not appear to be any undue haste or hustle in the mill; in fact, several operatives were seated on stools.

On the employment list are, in all, 475 operatives, i.e., about half for each shift.

The whole mill, particularly the weave room, looked empty of people; it is like one automaton.

The most difficult work for the management is the purchase of the cotton.

The well-known firm of Johnson & Johnson takes the whole of the output, and sells the bandages to all parts of the world. They cannot produce sufficient cloth in their various mills and buy some cloth in England, at a much higher rate than it costs to produce in U.S.A.

The humidity aimed at is . 55° in the card room, 65° in the spinning room, and 75° in the weaving room.

#### CHICOPEE VILLAGE.

Chicopee Village is as different from most mill communities as the mill itself is different from most mills. It is a village of beauty, healthfulness and home-like comfort—a community planned in advance and laid out in detail by landscape architects and engineers.

It is a village of rolling hills and winding roadways rather than a flat, uninteresting network of straight streets. It is a village of fine pavements, modern street lights, perfect drainage, sanitary sewers, well-kept lawns, flowering shrubs and shady trees.

Through the centre of this property runs the Appalachian Scenic Highway—the main highway from Washington, D.C., through Gainesville, to Atlanta. The village streets branch off from this main highway and wind up through hills which form a natural drainage and shed water on all sides. The ground is dry and high and commands a pleasing view of the surrounding country.

In addition to paved streets and concrete sidewalks, storm sewers are provided for the roadways, while all houses are connected with a sanitary sewerage system and a modern disposal plant. The extent of these sewers is indicated by the fact that 75 railway carloads of tile piping were required for their construction.

An additional 20 carloads of cast-iron pipe have been used in the construction of a modern water supply and fire protection system.

The electric street lights are of the latest and most ornamental type with no unsightly wires overhead. All village wiring is underground, and 10 carloads of material were required to construct the conduits in which these wires are buried. When wires are run underground in this way they cannot be short circuited or blown down by storms. Their concealment, moreover, improves the appearance of all streets and houses, while the landscape architects have given every other possible consideration to the symmetry and beauty of this ideal mill community.

All houses are within short walking distance of the mill while, for connection with other towns, the mills' own line of buses runs directly to the public square in Gainesville.

#### CHICOPEE HOMES.

Two hundred and fifty modern houses are now completed within the village limits. They are of 31 different types and, while all are faced with

tapestry brick, they are so varied in size, shape and colour that each has individual distinction and possesses none of that sameness and monotony so often found in mill communities.

These 250 houses can accommodate 1,500 people or the families of 500 workers in the mill. They are of three-room, four-room and five-room construction and are wired for electric light, with a drop light in each room. Every room, except the kitchen, has a coal grate fireplace with ornamental mantelpiece, while the kitchen is arranged to take either a coal, oil-burning or electric stove.

Every home, moreover, has a bathroom with "Standard" white porcelain fixtures and a toilet, bathtub and washbasin piped for running water. A Red Crown electric water heater is supplied to furnish the hot water.

The homes, in fact, are new and clean throughout, and will be *kept* so, with freshly plastered walls and artistically stained woodwork. There are screens in every door and window and railed porches front and rear.

The exteriors are built of brick for greater coolness in the summer, greater warmth in winter and because the brick looks better and retains its new and neat appearance for much longer than a house of wood. The roofs, in varied colours, are of finest quality Johns-Manville roofing, which is weatherproof and fireproof as well as a good insulation against heat and cold.

The grounds surrounding these houses provide for trim front lawns, while blocks of grouped garages have been erected at convenient points for the benefit of families who own automobiles.

Garbage and refuse is collected daily from every house in the village and disposed of in a modern incinerating plant. This collection is made, not by simply emptying each can into a cart, but by removing the can entirely and leaving a fresh and clean receptacle in its place.

All in all, these homes meet all modern standards of good living. They are rented to all workers for a moderate sum while, up to certain reasonable limits, the water and electric current are supplied to every household absolutely *free*.

Equal care is taken in providing for

#### THE SOCIAL LIFE OF THE COMMUNITY.

Two churches are located in the village, while six other churches are already to be found in Gainesville, only a few miles away.

A modern school has been erected for the children, in charge of competent teachers and under supervision of the State.

The social life centres about the Community House, where a large assembly hall is available for dancing and for other social gatherings, as well as for motion picture shows, gymnasium work and basketball. Keen athletic competition has grown up between the mills throughout this region, and basketball is one of the most popular sports.

Behind the Community House there is a splendid outdoor swimming pool and tennis courts, together with a large athletic field laid out as a baseball diamond.

Behind this field, in turn, there is to be a large and beautiful park, crossed by walks and artistically planted with shrubbery and trees.

All public playgrounds are in charge of competent supervisors, and special provisions will be made to regulate the play of younger children. For the benefit of the children, moreover, Boy Scout and Girl Scout activities are taken up.

A well-kept store is being operated at Community Centre. It is stocked with meats, groceries, fresh eggs, poultry and other daily needs, while clothing, household furniture and similar supplies are easily obtainable from any of the many stores in Gainesville.

Fresh milk, upon the other hand, is supplied directly to each household for, in former mill communities, it has been found that the keeping of

cows within or near the village limits has led to uncleanly and unsanitary conditions, while the milk obtained from such cows is not always the finest or healthiest procurable.

The Chicopee Manufacturing Corporation of Georgia has, therefore, arranged with a model dairy farm to supply the finest quality of fresh milk *at the actual cost of production*. This is more economical than the keeping of a cow and the milk is certain to be pure and wholesome. Fresh eggs and poultry will also be supplied at cost through the medium of the Community store.

#### THE CHICOPEE EXPERIMENTAL FARMS.

With a view to encouraging the most modern methods of agriculture throughout the district, the firm has established experimental farms for the scientific culture of long-staple cotton. This is a grade of cotton desired by all mills producing quality products. It was formerly grown successfully in the vicinity of Gainesville, but the spread of the boll-weevil made it necessary to take up the cultivation of quick-maturing varieties.

The Chicopee experimental farms will make every effort to re-establish the growing of Acala long-staple cotton in this region, and four separate 40-acre tracts are now in cultivation for this purpose.

#### A WORD OF EXPLANATION.

The Company states in one of its pamphlets :—

“ In supplying the capital necessary to create Chicopee mill, village and water-supply system, we did not lose sight of the fact that *we could* have built this mill and this community on a smaller tract of land and at a very much smaller expense.

We could, for instance, have used plain painted or unpainted walls instead of white-enamelled tile. We could have cut down the number and size of windows or used cheaper roofing material or a less substantial floor.

We could have marked out unpaved streets and have erected wooden houses without sewerage or running water. We could have done away entirely with bathtubs.

We did *not* do any of these things, however, for *we did not think that such a plan could possibly turn out to be a good investment*.

With many years' experience in mill production, we *knew* that a good home would keep the finest families working with us and that we would not have to constantly keep changing hands. We also knew that an intelligent God-fearing people would not stay in any village which lacked either a good church or good schools.

We knew, moreover, that good textile mill work could be done only in a structure which provides the workers with every modern advantage. We knew that properly protected eyesight is of far more value than a few dollars saved on windows and walls. We knew that the latest machinery is by far the most productive in the hands of skilful workers, and we knew that the safety of our workers is as much to be considered as their salary.

Then too we knew that cleanliness improves, not only personal appearance, but a man's whole character and makes of him a better worker and a more useful and respected citizen.

We further knew that any man or woman is but half a man or woman when half sick. Neither brains nor hands can possibly be used to best advantage unless backed up by bounding health.

We knew these things and many more, and hence *we do not think that any step which we have taken is in any way unwarranted extravagance.*”

#### SUMMING UP.

Starting with a perfectly clean slate in mill, in village and in every home, the Chicopee Manufacturing Corporation of Georgia has taken every possible precaution to assure the comfort, safety, health, happiness and welfare of its workers. In return for these provisions, we ask every employee and every member of his family to keep clean, keep well, keep the

peace, keep strict observance of the following household, village and mill regulations :-

#### HOUSEHOLD REGULATIONS.

1. Keep washbasins, bathtubs and water closet clean. (Special brushes are provided for this purpose.)
2. Keep your cook stoves and ice boxes *clean*.
3. Keep walls and ceilings *clean* in every room.
4. Keep porches *clean*.
5. Keep screens in windows throughout the summer.
6. Report at once any trouble with the lights or plumbing.
7. Keep grass on lawns cut, and grounds around house clean and free from rubbish.
8. Do not allow garbage or ashes to collect upon the premises. Put them in the cans provided for this purpose. These cans will be collected and their contents disposed of daily without charge.
9. Do not waste water and electric current. Turn off all electric lights, water faucets and electric stoves or heaters as soon as you are through with them.
10. Follow all directions of the visiting nurse when she makes her regular inspection of the premises.

#### VILLAGE REGULATIONS.

1. Keep sidewalks swept.
2. Help to keep all streets, parks and playgrounds clean. Do not scatter papers or other rubbish on any part of the property.
3. Never park an automobile in front of a fire hydrant.
4. Do not tamper with fire hydrants or the village telephones.
5. Do not damage trees, shrubs, roadways or any other public property.
6. Cows, mules, horses and goats must not be kept upon the property, and household pets must not include a vicious dog or any other animal which can menace or annoy your neighbours.
7. Know where your children are and what they are doing when not in school or in charge of a director at the playgrounds.
8. Use village telephones to instantly report an outbreak of fire.
9. Report immediately to the trained nurse in every case of sickness.
10. Report all public nuisances, disturbances and violations of the law to the Department of Public Safety.
11. Use village telephones to report accidents.

#### MILL REGULATIONS.

1. During working hours do not leave the department in which you are employed except upon business undertaken with permission or on order from the head of that department.
2. No one is permitted to call you from your work and you are not permitted to call others from their work except in case of extreme emergency.
3. When leaving the mill always use the exit allotted to the department in which you are employed.
4. Report at once, to the head of your department, any accident or breakage of machinery.
5. Do not at any time attempt to clean or adjust machinery while same is in motion.
6. Do not smoke or carry matches inside the mill or on the mill property. A fire may deprive you of your job and strict observance of this rule will help the management protect your job.
7. Keep all doors closed which bear a notice telling you to do so.

8. Keep all toilets clean. They are for *your* comfort and convenience and their cleanliness protects your health. Do not, therefore, throw waste matter in the bowls. Do not spit on the floor. Do not write on the walls. Always flush the bowls after using and, if a toilet gets out of order, notify the head of your department immediately.
9. In order to promote cleanliness and sanitation throughout the mill, you are required, during working hours, to wear the standard mill uniform.

*Special rules or notices will be posted on the Mill Bulletin Board from time to time and should have the attention of each employee.*

#### NOTICE TO HEADS OF DEPARTMENTS.

A responsible person should be stationed at the door of each department as soon as the mill is open and during the noon hour, as well as at the time of change of forces.

Each head of department should report to their respective departments five minutes before the time for beginning of work and should remain in that department until all employees have departed.

It is important that all heads of departments shall immediately report all accidents, no matter how slight, to the office of the Superintendent.

In case of illness of any employee, or any member of his or her family, from any contagious disease, it shall be the duty of the head of the department to report this illness at once to the Superintendent of the mill, giving full particulars.

ARNO S. PEARSE.

## STANDARD MARINE INSURANCE COMPANY,

LIMITED

Established 1871

The "STANDARD" is the LARGEST INSURER of  
AMERICAN RAW COTTON IN THE WORLD

New York Office:  
COTTON EXCHANGE BUILDINGS

Manchester Office:  
13, ST. ANN STREET

HEAD OFFICE:  
EXCHANGE BUILDINGS,  
LIVERPOOL

## UNITED STATES EXPORTS OF COTTON CLOTH

(Including Duck and Tyre Fabrics)

TOTALS BY COUNTRIES FOR THE FISCAL YEAR ENDED JUNE 30,  
1913, AND CALENDAR YEAR 1927*Source: Department of Commerce, Bureau of Foreign and Domestic Commerce,  
Washington.*

	1913		1927	
	Sq. yds.	Value \$	Sq. yds.	Value \$
Austria .. .. .	-	-	28,485	8,195
Azores and Madeira Islands ..	441,089	34,197	787,611	87,422
Belgium .. .. .	2,384	597	13,159	2,107
Bulgaria .. .. .	31,255	1,894	-	-
Czecho-Slovakia .. .. .	-	-	3,981	538
Denmark .. .. .	4,395	737	702,707	143,594
Finland .. .. .	752	2,243	152,159	43,375
France .. .. .	32,505	4,366	16,017	2,629
Germany .. .. .	173,684	26,752	96,783	25,544
Gibraltar .. .. .	-	-	706	270
Greece .. .. .	186,713	15,498	3,628,279	413,885
Hungary .. .. .	-	-	10	3
Iceland .. .. .	-	-	102	22
Italy .. .. .	1,100	220	216,061	25,485
Malta, Gozo and Cyprus ..	3,422	398	-	-
Netherlands .. .. .	9,473	2,605	719,447	191,094
Norway .. .. .	90,710	13,397	2,426,319	431,626
Poland and Dantzig .. .. .	-	-	5,523	1,896
Portugal .. .. .	93,680	16,555	91,399	30,565
Roumania .. .. .	-	-	223,990	18,877
Soviet Russia in Europe ..	2,417	237	97,721	9,166
Spain .. .. .	6,988	699	75,055	9,796
Sweden .. .. .	20,491	9,260	437,082	103,439
Switzerland .. .. .	2,450	215	17,184	3,556
Turkey in Europe .. .. .	3,097,582	221,641	662,638	81,276
United Kingdom (England) ..	2,468,976	424,124	7,698,980	2,076,772
Yugoslavia and Albania ..	-	-	516,257	45,627
Canada .. .. .	27,121,528	2,507,341	62,981,026	8,512,279
British Honduras .. .. .	1,104,191	80,961	953,875	112,691
Costa Rica .. .. .	3,930,876	229,324	7,511,937	948,498
Guatemala .. .. .	5,201,618	355,590	11,970,456	1,601,593
Honduras .. .. .	8,309,639	550,978	9,069,012	1,116,823
Nicaragua .. .. .	3,317,707	227,457	12,179,525	1,410,137
Panama .. .. .	5,101,141	345,396	7,632,701	916,582
Salvador .. .. .	7,082,448	391,330	11,089,891	1,126,888
Mexico .. .. .	2,647,934	350,239	11,042,501	1,987,578
Miquelon and St. Pierre Is. ..	2,935	211	39,545	9,819
Newfoundland and Labrador ..	855,391	84,898	1,234,008	202,283
Bermudas .. .. .	104,374	9,220	215,450	37,379
Barbados .. .. .	263,139	22,520	521,219	72,197
Jamaica .. .. .	6,384,407	449,569	13,480,217	1,366,885
Trinidad and Tobago .. .. .	1,386,756	90,442	2,405,700	261,084
Other British West Indies ..	2,256,002	166,198	2,812,088	346,560
Cuba .. .. .	22,073,968	1,532,384	79,994,522	10,145,825
Dominican Republic .. .. .	13,158,720	877,121	23,033,502	2,991,263
Netherland West Indies ..	1,286,278	79,714	1,241,798	222,912
French West Indies .. .. .	132,937	11,927	22,835	4,065
Haiti, Republic of .. .. .	20,171,988	1,386,999	27,336,853	3,318,459
Virgin Island of U.S. .. .. .	168,420	13,306	449,574	76,017
Argentina .. .. .	1,529,374	180,000	24,754,165	4,344,052
Bolivia .. .. .	4,679,602	286,101	7,235,353	772,443

	1913		1927	
	Sq. yds.	Value	Sq. yds.	Value
		\$		\$
Brazil .. .. .	1,135,742	120,047	6,990,824	1,313,109
Chile .. .. .	10,497,348	689,406	24,428,548	2,651,461
Colombia .. .. .	26,387,657	1,336,747	29,488,723	3,698,350
Ecuador .. .. .	2,926,299	178,054	5,346,346	628,394
British Guiana .. .. .	838,598	50,980	918,021	105,523
Surinam .. .. .	199,841	16,155	843,009	112,461
French Guiana .. .. .	1,924	302	19,528	2,202
Paraguay .. .. .	21,447	2,382	5,419,334	643,208
Peru .. .. .	1,766,517	125,474	4,765,652	750,917
Uruguay .. .. .	310,304	38,275	3,279,582	449,383
Venezuela .. .. .	3,368,905	344,105	6,328,054	1,045,638
Aden .. .. .	24,690,495	1,433,940	3,828,085	266,844
Arabia, Hejaz, etc. .. .. .	—	—	179,190	15,127
British India .. .. .	13,748,274	1,163,725	5,547,456	684,576
British Malaya .. .. .	717,788	65,131	2,521,375	426,692
Ceylon .. .. .	—	—	249,640	27,757
China .. .. .	80,461,847	5,584,985	1,024,327	184,695
Java and Madura .. .. .	17,271	1,092	2,012,985	374,628
Other Netherland East Indies .. .. .	—	—	16,347	2,577
Hong Kong .. .. .	2,116,819	264,225	250,583	91,515
Iraq .. .. .	—	—	65,863	8,235
Japan and Chosen (Korea) .. .. .	155,801	21,906	146,381	47,199
Kwantung .. .. .	—	—	52,886	12,571
† Palestine .. .. .	—	—	44,813	7,806
Philippine Islands .. .. .	93,259,705	5,777,276	88,016,312	11,345,805
Siam .. .. .	—	—	113,081	19,425
Soviet Russia in Asia .. .. .	27,027	2,530	173,331	29,380
‡ Syria .. .. .	—	—	416,611	63,821
Turkey in Asia .. .. .	3,874,603	253,976	108,610	9,585
Other Asia .. .. .	—	—	6,137	1,189
Australia .. .. .	8,314,493	736,021	8,648,520	2,067,113
British Oceania .. .. .	97,401	8,321	265,254	27,832
French Oceania .. .. .	608,419	53,174	295,015	36,923
New Zealand .. .. .	1,390,630	155,888	1,649,358	290,421
Ethiopia .. .. .	—	—	—	—
Belgian Congo .. .. .	—	—	14,955	3,043
British East Africa .. .. .	15,301,954	804,051	4,006,317	268,412
British South Africa .. .. .	251,572	39,856	15,113,366	2,602,999
British West Africa .. .. .	45,058	3,289	120,981	20,401
Egypt .. .. .	637,482	43,643	1,156,814	192,161
Algeria and Tunisia .. .. .	2,661,081	155,925	260	63
Madagascar .. .. .			—	—
Other French Africa .. .. .	45,770	3,316	42,973	6,991
Liberia .. .. .			6,855	1,759
Morocco .. .. .	—	—	2,000	197
Mozambique .. .. .	174,953	16,588	1,800,090	330,159
Other Portuguese Africa .. .. .			241,944	40,382
Canary Islands .. .. .	334,517	28,741	1,096,375	138,021
Other Spanish Africa .. .. .	—	—	1,746	419
German Africa .. .. .	2,900,260	140,847	—	—
Total .. .. .	444,729,241	30,668,234	564,883,865	76,738,437

† Includes Syria prior to 1927.

‡ Included under Palestine prior to 1927.

Note the increases that have taken place in exports to Azores, Denmark, Finland, Greece, Netherlands, Norway, Roumania, SWEDEN, GREAT BRITAIN, CANADA, all South and Central America, JAVA, BRITISH SOUTH AFRICA, Egypt, Portuguese Africa.

## THE AMERICAN COTTON MILL INDUSTRY.

(Address by Mr. H. WINDFELD-HANSEN, of the *Aktieselskabet Mogensén og Dessaus Væverier*, Odense, Denmark, before the International Cotton Committee at Amsterdam, October 22nd, 1928.)

Mr. Pearse's report is, in my opinion, the most valuable book written for many, many years on our industry, and the information contained therein is of such great importance that it will take months to digest it thoroughly. The information submitted by Mr. Pearse is so exact and detailed that, in my opinion, no book exists giving information as valuable as his report.

May I be permitted to give a few details as to the development of the cotton industry of U.S.A., or rather a historical description of the growth of it, which to some extent will explain the great differences between U.S.A. and European mill practice.

When the industry rapidly developed during the latter part of the nineteenth century in the Northern States the greatest difficulty the manager had to contend with was the question of labour, and especially skilled labour. This caused wages to soar and made the running of mills often more of a labour question than a business or technical question. This led to economizing labour and to make the machines and processes as foolproof as possible. The cost of machinery was never so great as the cost of labour, and that was the birth of the whole system now so ably described by Mr. Pearse in his report. U.S.A. at once concentrated its energy on getting the maximum production out of every worker, and never considered the then-resulting smaller production of the machinery or even the cost of a better class of raw material.

When I arrived in U.S.A. I found this to be still in practice; now they have gone further and developed the production per machine as well, yet I hesitate to say that this has reached the production often found in England of machinery—I repeat machinery.

In the spinning mill this resulted in the use of larger cans, and this, of course, has not slowed production, but the speed frames were very different in gauge, etc., to the European. Slubbers were always  $12 \times 6$ , but that meant a lower speed than in use on the regular  $10 \times 5\frac{1}{2}$  in Europe, and resulted in lower production, yet a saving in labour resulted therefrom both at the slubber and creeling the intermediate. Intermediates were always  $10 \times 5$  with the same result; so was the roving 8 ins.  $\times$  4 ins. or 8 ins.  $\times$   $3\frac{1}{2}$  ins. Ring spinning was totally different from European practice, and, I venture to say, the frames built in U.S.A. are far better constructed than the European. I am not talking about the lasting property; there the European ring frame was by far the best, but the spinning properties were far superior to the English, and to this is no doubt due the fact that the scope of the ring frame has been wider than in Europe. I shall not go into many details, but just mention the most important.

\* Mr. H. Windfeld-Hansen was for several years engaged in the cotton mills of U.S.A.

The English ring frame maker built his machine from the point of producing a cheap machine, narrow width, narrow gauge, coarse pitch change wheels, cheap lappets, angle of stands, quality of rings and spindles not as good as the U.S.A. frame. The latter points have been remedied fully by most English makers in the later years, but in other respects they seem entirely to neglect vital points. Possibly this is due to the spinner being unwilling to pay the extra price and not being aware of the fact that it pays him to pay an extra price and get a machine which is infinitely better and enables him run more spindles per operative.

First of all 2 ft. 9 ins. width is wrong from an engineering point of view, also two tin rollers. Twenty years ago U.S.A. began using tape drive for spindles, getting a positive drive, *better* yarn and *better* spinning. But this drive must be made right or it will give greater difficulties.

Further, narrow gauge with any kind of anti-ballooning device is an evil unspeakable. Twenty years ago the rapid leaving of this was noticeable in U.S.A., and the specifications contained in Mr. Pearse's report confirm this. The very idea of trying to limit the ballooning is wrong in every way. The yarn hits the separator and leaves lint, etc., on it, and no matter what type is used it cannot give the same result as a frame with wide gauge and separators. They may have them for use when starting up, but immediately this is over they are pushed back. The thread is free from all interference, the traveller is kept free from lint and less ends come down. The advantages are evident to any spinner. More spindles can be looked after also, as less ends break and the yarn produced is better. The angle of the roller stands was 20 years ago much steeper than in Europe; only in recent years have Europeans gone to 30°. In U.S.A. examples are found of 35° stands. The advantage is very evident. Distance from nip to spindle top was greater, allowing bigger lifts, also the U.S.A. warp wind on ring bobbins produces a much more even ballooning and can be absolutely recommended in preference to European practice.

The infinite care taken in the making of rings and spindles surprised me; also the high polish given to the rings. The spindles are all of the self-oiling type. Considering the cumbersome oiling of the usual type of ring spindles in Europe, the amount of labour taken in doing so, the number of spindle bands slackened, resulting in too softly twisted ends, loss of production, it seems evident that the U.S.A. practice is by far superior from the cost and quality point of view.

I think in this matter the spinner is the one to blame, not the machine maker. The European machine builder is capable of producing the same machine in every respect as the American builder, but when a new mill is constructed, in nine out of ten cases here in Europe the spinner is willing to pay an extra price for his power plant in order to obtain a very low cost of power, but the moment he comes to the question of buying spinning machinery he will look at every penny per spindle he has to pay extra. In the case of the power plant he has the guaranteed figures to go by; in the other case he has the uncertainty of obtaining all the benefit that

should come of the greater outlay, and the machine builders are very often handicapped because it is a question of prices that keeps them back.

The chief point in the popularity of the ring frame in comparison to the S.A. mule is lower cost of production and ease to run. A girl can learn the job in a few days; when, added to this, comes the fact that the ring frames built in U.S.A. are infinitely better than the European frame from a spinning point of view, the defeat of the S.A. mule can be readily understood. When, added to this, comes the difficulty of getting good mule spinners and piecers, and the great difficulty of making them stay for a great length of time in one mill, then the position can be easily understood. Further, to this can be added that the S.A. Mule Spinners' Union was one of the strongest and most difficult to deal with of all. The mule spinners considered themselves capable of anything in the matter of forcing unreasonable demands and creating sudden strikes. You can well understand the mules being unpopular.

Further, the special characteristics obtained in a mule-spun yarn did not seem of great importance in the trade; then, also, the advantages of being able to use a slightly lower grade of raw cotton and the use of the higher draft were not properly understood, or, rather, they were not of so great importance as in Europe.

What has originally been the cause of the U.S.A. mills putting more twist in the same count of yarn, compared to European or, rather, English practice, I do not exactly know, but I imagine that this has been caused by the lack of labour forcing the mills to have more sides to a spinner, also by the weave sheds demanding the strongest possible thread, so as to enable them to run more looms per weaver. That is the only explanation I can think of, because the loss in the feel and appearance of the cloth is great. In some cloths it may not be of great consequence—for instance ducks and denims; but all cloths where the texture is lighter and the cloth has to be bleached, dyed and mercerised, the hardness will tell much to the detriment of the cloth. But the U.S.A. public has for years been brought up on hard twisted yarn and cloth, and this counterbalances the other points from our view.

The standard warp twist in U.S.A. for 20's is 21.24, whilst in England 18.00 is normal; in U.S.A., for 30's, 28.00; and in England, 24. This must be taken into account in the costing, because it means 16 per cent. greater outlay to buildings, machinery, power and upkeep.

I am quite aware of the fact that the ring frame is victorious in the battle with the mule also in Europe, but I should like to point out that for certain purposes you cannot obtain the wonderful results in finishing with a ring yarn as is possible with a mule yarn. A finisher will always prefer a mule yarn, and so will the sizer, and when it comes to getting width and length the mule yarn beats ring yarn every day. Also this point must certainly be considered. My experience is that a cloth can be made 5 per cent. lighter in weight with the mule yarn, yet it will feel as full and look more closed than the same cloth 5 per cent. heavier made with ring yarn. Then again, a few cloths weave better and come out better in the finishing

when using ring yarn. In my opinion, many manufacturers are apt to look at the costs separately, but if all the costs and ultimate results are compared then there is no doubt in my mind, considering the demands for quality and feel in Europe, that the mule is not beaten hollow.

I agree with Mr. Pearse that it is not in the spinning we have a lot to learn, though I must say that in the matter of ring spinning both machine builders and spinners have much to learn from U.S.A. Also, in another way, I do think we can learn a good deal in spinning, and that is in the specialization of labour, using high-grade labour where it is required, and ordinary labour at cheaper rates where it can be employed without detriment to production and quality, thereby reducing costs. This, however, is difficult, owing to the unions—a difficulty little known in U.S.A.

A great deal of care and attention is paid to the preparatory department in U.S. mills, and rightly so. The clearing of the yarn is a very great factor in the U.S. mills, and all sorts of devices are tried to improve this, to catch slubs, bad piecings, thin places, soft twists, etc., and remarkable results are obtained thereby. Also the knots tied must be weavers' knots. I have used the Boyce knotter for four years, and can testify to its advantages. Here the American excels; few mills in Europe pay the attention to these points as they do, and no doubt many of the wonderful results obtained in the sheds are due to this fact. But it costs money to do it properly, and therefore we often in Europe pass it by.

In the matter of winding machinery, whether it runs 1,000 or 2,000 revs. does not make the great difference in costs, as it simply means running more or less spindles per operative; but what does matter is the size of bobbin delivered to the winder to wind from, and there the American is ahead by leaps and bounds of Europe.

I think that manufacturers in Europe are becoming fast aware that radical changes must be made in the preparatory systems, and a great many systems are now in use similar to the "Leesona" universal winding system; but they are, I admit, so far only the exceptions to the rule. But also here the unions often bar the way.

The preparatory department is certainly one of the chief points to go into, and we must thank Mr. Pearse for pointing it out clearly.

The report from the weave shed is so remarkable that it speaks for itself, and it is a rude awakening for Europe. The history of the industry also here plays an important part. Scarcity of labour, and especially of skilled labour, has caused the almost universal adoption of the automatic looms, and as this was greatest in the South it bears out the statement that few non-automatic looms are found there. American manufacturers were quick to realize that it was easier to teach an unskilled or raw operative to run an automatic loom than an ordinary loom; and this, coupled with the fact that labour was scarce, made the automatic looms imperative. As years have gone by, and competition has increased, all the advantages of the automatic looms have been made use of to the highest degree.

I am in agreement as to the findings of the report *re* the advantages and disadvantages of the automatic looms, but I would like to add a few points to the comparison. In a country where labour is cheap the advantages are not so great; also, in a country where labour is cheaper than in U.S.A., the cost of the initial outlay has to be taken into consideration. A mill can buy four times the number of ordinary looms for the same money required to buy automatic looms.

In normal trade a smaller margin of profit will yield a greater profit to the manufacturer, and in good times a much greater profit will be earned on the common loom. If the automatic loom can be run day and night, then the question alters considerably.

It must be taken into account, as the report states, that the preparatory processes are more expensive for the automatic looms; further,

- (1) That the yarn must be slightly better;
- (2) That the cut-looking is slightly more expensive;
- (3) That the winding charge for the weft must be taken into account anyhow, taking the Draper loom as example;
- (4) That the cloth woven must be staples;
- (5) That very heavy-sized yarn is not exactly suitable, due to the warp-stop motion scraping a lot of size off.

Take a high-pick cloth, fine count, the automatic loom must be a paying proposition; but take a low-pick cloth, close weft, the difference in cost is not of great importance. The automatic loom is a highly paying proposition the higher the wage, whilst a cloth that does not cost much to weave is not as good a proposition. I think this has to be taken into account when considering the automatic loom on this side of the water.

Mr. Pearse mentions that all the automatic looms in U.S.A. are underpick looms, whilst Lancashire and the Continent favour the overpick because of the 30 picks more per minute of the latter. I think this is due to a slight misunderstanding. An automatic loom will not run economically at a higher speed than 180, whether over or underpick. The breakages will be too heavy. Also few underpick looms can run at a higher speed, whether automatic or not.

The wonderful results obtained in the weaving room have been helped by organization of the selling end. The specialization has been helped by the big available population, 120,000,000, whose demand is fairly standard from East to West, from North to South. This has been a great boon to the mills, and has helped to obtain the wonderful results.

If we consider the manifold wants in qualities, finishes, designs, each differing radically here in Europe, we find one reason for the sheds being behind U.S. mills. The middleman here, too, is not fulfilling his mission; he will only buy when he has sold, and then delivery must be made at once. This causes an order nowadays to be what may be called retail, and orders for 300 yards per quality or design is a common occurrence. Then the number of shades required is absurd; there is no necessity for it; the number of finishes is appalling, and then the quantities are negligible. The loss in production, the loss in efficiency, the loss in ridiculous claims is greater than can be measured. To introduce or to obtain the same results or manufacturing efficiency in Europe it is necessary

to start with the organization of the selling end, and it is noticeable that big firms are realizing this.

If the U.S. manufacturer had to trade under our conditions his results obtained to-day would vanish to a very great extent. Mr. Pearse's description of the American spirit of co-operation is an eye-opener. How this spirit can be created in Europe I cannot see; the unions are not sufficiently broadminded here for that. Schemes of co-operation seem to have failed here, the unions being the cause, because the unions have tried to exploit those schemes politically—that is, from a class point of view. Year after year unions have preached that the workers were being cheated of the fruits of their labour, and have made the workers look upon the heads of the mills as their opponent—as the people who rob them. How can this feeling be eradicated and the spirit of co-operation be replaced? I am sorry to say that I do not see how.

Mr. Pearse's description of the esprit de corps is so wonderful that it makes one wonder whether this is not as valuable as all the other advantages which he cites.

### “WHAT HAPPENS.”

This is the title on the front page of the *American Wool and Cotton Reporter* of October 18, 1928. The short but pithy article, describing the lamentable conditions of the cotton industry in Massachusetts, reads as follows:—

“In Lowell, Mass., 175,000 spindles in the Massachusetts cotton mills have gone; 180,000 spindles have gone out of the Tremont and Suffolk; 200,000 spindles have gone out of the Hamilton; 160,000 spindles have gone out of the Appleton; 40,000 spindles have gone out of the New England Southern; 100,000 spindles have gone out of the Lawrence Manufacturing Co.; totalling 855,000 spindles, complementary looms, and wages paid week by week; the taxes paid to the city, and hundreds of thousands of dollars distributed amongst the merchants—all gone.

In Fitchburg, Mass., the Parkhill Mills, the Orswell Mills and the Nockege Mills have gone; the Grant Yarn Company is on the market for sale, and the big cotton-yarn spinning equipment of another large mill is out of business. Once there were 5,000 cotton looms in Fitchburg; now there are 40 cotton looms there.

In Fall River, Mass., taxable property is down \$27,000,000 as compared with last year and previous years, due partially to the fire in that city, but largely to the liquidation of mill properties and the obsolescence of machinery.

The 48-hour law in Massachusetts, high taxes due to municipal and State extravagance, bad leadership and obsolete machinery are the conditions responsible for all of the above. Grant that the 48-hour law in Massachusetts and extravagant taxes cannot be easily corrected, it is a fact that the obsolescence of machinery and the lack of good leadership of the operatives can be prevented in the future. Perhaps good machinery equipment is the most important consideration.”

Have we not read of late similar comments upon the cotton industry of other countries? Massachusetts suffers very much from Southern competition, where mills are modern, working hours long and wages low.

## Bureau Cotton Crop Reports.

*United States Department of Agriculture,  
Bureau of Agricultural Economics, Washington, D.C.,  
September 8, 1928, 11 a.m., E.T.*

COTTON REPORT AS OF SEPTEMBER 1, 1928.

A United States cotton crop of 14,430,000 bales (500 lbs. gross weight) in 1928 is indicated by the September 1 condition of 60.3 per cent. of normal estimated by the Crop Reporting Board of the United States Department of Agriculture. This report is based upon data from crop correspondents, field statisticians, and co-operating State Boards (or Departments) of Agriculture and agricultural colleges.

On the basis of September 1 reports of abandonment after July 1, the preliminary estimate of total abandonment after July 1 is placed at 1,770,000 acres, or 3.8 per cent. of the 46,605,000 acres in cultivation in the United States on July 1. This would leave for harvest this season a total of 44,916,000 acres. Upon that acreage the crop of 14,430,000 bales indicated by the September 1 condition would approximate a yield of 153.9 lbs. of lint cotton per acre.

The final outturn of the crop will depend upon whether the various influences affecting the crop during the remainder of the season are more or less favourable than usual.

Production in 1927 was 12,055,000 bales; in 1926, 17,077,000 bales; in 1925, 16,104,000 bales; in 1924, 13,628,000 bales; and in 1923, 10,140,000 bales.

Condition on September 1 in 1927 was 56.1 per cent. of normal; in 1926, 50.6 per cent.; in 1925, 56.2 per cent.; and the 10-year average on September 1, 1917-1926\* was 57.1 per cent.

The yield per acre in 1927 was 154.5 lbs.; in 1926, 182.6 lbs., and average for the 10 years 1917-1926, 156.3 lbs.

STATE	1928 ACREAGE		SEPT. 1 CONDITION			YIELD PER ACRE		PRODUCTION (Ginning*)	
	Total abandonment after July 1 (Prelim.)	For harvest (Prelim.) in Thousands of Acres	10 year average 1917-1926†	1927	1928	10 year average 1917-1926	1927	1928‡	Gr. Wt. Bales 1928 Crop Indicated by Condn. Sept. 1
	P. Ct.	Acres	P. Ct.	P. Ct.	P. Ct.	Lbs.	Lbs.	Thousand Bales	Thousand Bales
Va.	2.4	82	70	70	78	211	230	268	31
N.C.	1.7	1,839	67	61	69	256	298	252	861
S.C.	3.5	2,487	56	48	58	191	148	171	730
Ga.	4.0	3,798	51	55	58	142	154	138	1,100
Fla.	6.0	94	58	58	58	102	126	97	17
Mo.	5.9	367	72	52	64	248	188	215	115
Tenn.	4.5	1,082	66	60	65	176	178	195	359
Ala.	3.0	3,367	59	58	59	140	180	138	1,191
Miss.	2.5	3,688	61	57	60	174	194	162	1,355
La.	3.0	1,829	55	55	53	156	170	146	548
Tex.	4.0	17,631	52	56	61	134	129	139	4,352
Okla.	5.5	4,630	59	51	53	151	138	135	1,037
Ark.	4.0	3,468	63	55	61	168	157	172	1,000
N. Mex.	5.3	108	488	90	80	273	352	354	70
Ariz.	1.0	198	85	90	87	280	315	321	91
Calif.	.9	221	889	90	87	279	340	322	91
Other	6.9	27	-	77	62	197	160	177	7
U.S.	3.8	44,916	57.1	56.1	60.3	156.3	154.5	153.9	12,955
Lower Calif.¶	.0	100	--	90	87	--	194	284	45

\* Previous to 1924 interpolated from August 25 and September 25 condition.

† On area left for harvest.

‡ Allowances made for cross State ginnings.

§ Less than a ten-year average. ¶ NOT included in California figures NOR in United States total.

*October Crop Forecast of the Crop Reporting Board,  
Washington, D.C.*

	1928		1927		Ten year av. Oct.
	Oct. 1	Sept. 1.	Oct. 1.	Sept. 1.	
Virginia .....	70	78	64	70	67.1
North Carolina .....	59	69	57	64	62
South Carolina .....	49	58	44	48	51
Georgia .....	50	58	54	55	48
Florida .....	50	58	57	58	53
Missouri .....	57	64	50	52	66
Tennessee .....	56	65	56	60	59
Alabama .....	50	59	60	58	55
Mississippi .....	54	60	58	57	57
Louisiana .....	50	53	54	55	51
Texas .....	58	61	55	56	51
Oklahoma .....	47	53	44	51	53
Arkansas .....	53	61	54	53	57
New Mexico .....	84	89	85	90	—
Arizona .....	80	87	87	90	86
California .....	85	87	91	90	84
Other States .....	69	62	69	77	—
Average ...	<u>54.4</u>	<u>60.3</u>	<u>54.2</u>	<u>56.1</u>	<u>53.5</u>

The following table gives details of production in thousands of bales:—

	1928		1927	1926
	Oct. 1.	Sept. 1.	Final.	Final.
Virginia .....	45	46	31	51
North Carolina .....	925	970	861	1,213
South Carolina .....	820	890	730	1,008
Georgia .....	1,060	1,100	1,100	1,496
Florida .....	18	19	17	32
Missouri .....	157	165	115	218
Tennessee .....	385	441	359	452
Alabama .....	930	970	1,191	1,498
Mississippi .....	1,320	1,250	1,355	1,887
Louisiana .....	580	560	548	829
Texas .....	5,050	5,100	4,352	5,631
Oklahoma .....	1,210	1,306	1,037	1,773
Arkansas .....	1,130	1,250	1,000	1,548
New Mexico .....	77	80	70	71
Arizona .....	130	133	91	123
California .....	147	149	91	131
Other States .....	9	10	7	16
Total .....	<u>13,993</u>	<u>14,439</u>	<u>12,955</u>	<u>17,977</u>

The Washington Department of Agriculture, in a supplementary report, states that the reduction in the indicated crop of cotton is due to unfavourable climatic developments. Excessive and continuous rains in the South Atlantic States caused heavy losses from boll-weevil and boll-rot, while low average temperatures in the northern portions of the Belt prevented average development of bolls. Continued drought in parts of Oklahoma reduced the size of the bolls and the outturn of lint. The slight improvement which resulted in Mississippi and Louisiana was due to favourable maturing weather.

## GRADE AND STAPLE OF GINNINGS.

The report of the Bureau of Agricultural Economics on grade, staple and tenderability of 956,486 bales of cotton ginned in the United States prior to September 1 is based on estimates from data obtained from the classification of samples representing all the cotton ginned by certain gins selected to represent the grades and staple lengths of cotton ginned in the United States. Details:—

### STAPLE IN INCHES.

	Bales	Per Cent.		Bales	Per Cent.
Total ... ..	956,486	100-00	1 $\frac{1}{16}$ and 1 $\frac{3}{16}$ ..	38,193	3-99
1 $\frac{3}{16}$ and under ..	98,978	10-35	1 $\frac{1}{16}$ and 1 $\frac{5}{16}$ ..	14,546	1-52
1 $\frac{5}{16}$ ..	356,437	37-26	1 $\frac{3}{16}$ and 1 $\frac{7}{16}$ ..	9,857	1-03
1 $\frac{7}{16}$ ..	277,650	29-03	1 $\frac{1}{2}$ and over ..	1,445	0-15
1 and 1 $\frac{1}{16}$ ..	159,380	16-66			

### TENDERABLE AND UNTENDERABLE.

	Bales	Per Cent.
Total .. ..	956,486	100-00
Total tenderable .. ..	856,181	89-51
Tenderable $\frac{3}{8}$ to 1 $\frac{1}{16}$ inclusive ..	792,246	82-83
Tenderable over 1 $\frac{1}{16}$ ..	63,935	6-68
Total untenderable .. ..	100,305	10-49

### GRADES.

	Bales	Per Cent.		Bales	Per Cent.
Total .. ..	956,486	100 (d)	Yellow tinged (total) ... ..	243	0-02
Extra white (total) ..	10,328	1-08	No. 2-S.G.M. ... ..	22	(e)
No. 3-G.M. ... ..	6,702	0-70	No. 3-G.M. ... ..	46	(e)
No. 4-S.M. ... ..	1,952	0-20	No. 4-S.M. ... ..	150	0-02
No. 5-M. ... ..	723	0-08	*No. 5-M. ... ..	25	(e)
No. 6-S.L.M. ... ..	221	0-02	*No. 6-S.L.M. ... ..	..	..
No. 7-L.M. ... ..	730	0-08	*No. 7-L.M. ... ..	..	..
White (total) ... ..	937,398	96-00	Lt. yellow stain (total) ... ..	25	(e)
No. 1-M.F. ... ..	33	(c)	No. 3-G.M. ... ..	11	(e)
No. 2-S.G.M. ... ..	21,968	2-30	*No. 4-S.M. ... ..	..	..
No. 3-G.M. ... ..	389,866	40-76	*No. 5-M. ... ..	14	(e)
No. 4-S.M. ... ..	360,588	37-70	Yellow stained (total) ... ..	22	(e)
No. 5-M. ... ..	129,031	13-49	No. 3-G.M. ... ..	11	(c)
No. 6-S.L.M. ... ..	26,501	2-77	*No. 4-S.M. ... ..	11	(e)
No. 7-L.M. ... ..	8,245	0-86	*No. 5-M. ... ..	..	..
*No. 8-S.G.O. ... ..	998	0-10	Grey (total) ... ..	143	0-01
*No. 9-G.O. ... ..	168	0-02	No. 3-G.M. ... ..	77	(e)
Spotted (total) ... ..	8,193	0-86	No. 4-S.M. ... ..	44	(e)
No. 3-G.M. ... ..	1,642	0-17	*No. 5-M. ... ..	22	(e)
No. 4-S.M. ... ..	4,235	0-44	No grade* ... ..	(f) 134	0-01
No. 5-M. ... ..	1,973	0-21			
*No. 6-S.L.M. ... ..	333	0-03			
*No. 7-L.M. ... ..	10	(e)			

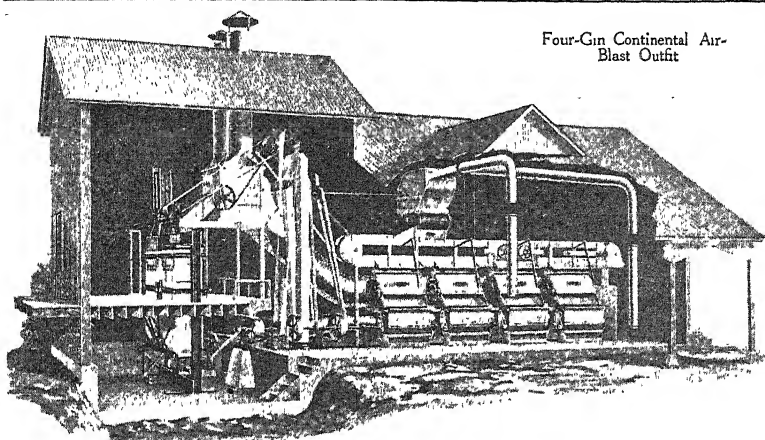
(a) According to Official Cotton Standards of the United States.

(d) Percentages computed to the nearest one-hundredth per cent.

(e) Less than one one-hundredth per cent.

(f) Includes all bales not otherwise classified above, such as gin out, mixed packed, water packed, etc.

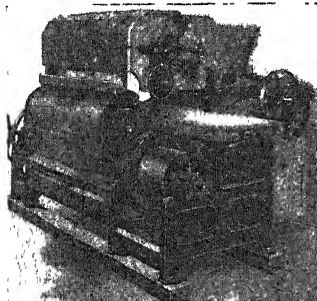
\* Untenderable according to Section 5, U.S. Cotton Futures Act.



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## MARKET LETTERS.

*Bond, McNamany & Co.*, New York, write in their digest of 26th October, 1928:—

"As things now stand, then, no valid ground can be discovered for believing that this year's crop of American cotton will exceed the last Government estimate of just short of 14,000,000 bales, and there is obviously more than a mere possibility that the final outturn of the crop will be substantially below this figure. Such a crop would mean a maximum world supply of American cotton for 1928-1929 of approximately 18,800,000 bales, assuming the carry-over from last year to be correctly computed. On the basis of the actual experience of the years since the panic of 1920-1921 the average price of distribution of such a total supply should be at least 22 cents per pound at the Southern spot markets, with the highest prices embraced in that average sufficiently above the average itself to counter-balance the much lower prices at which more than one-half of the crop has already been marketed. It is, of course, impossible to foretell the precise stages by which the economically indicated average price of distribution will be achieved. It is already possible, however, to discern the gradual development of powerful price-enhancing forces which may be expected to come into play a little later in the season. For one thing, the spinners at home and abroad have this year carried to very dangerous extremes the method of contracting for cotton 'on call,' instead of at a fixed price—a method which can succeed only in seasons of abundant supply, but which in seasons of scanty supply inevitably results in the accumulation of a great 'short' interest, essentially speculative in character and hence exposed to all the risks by which the speculative 'short' is beset. It is estimated by those in close touch with the spot situation that spinners' commitments in respect of cotton bought 'on call,' the price of which is still unfixed, represent at the present moment a total of at least 3,000,000 bales and probably much more than this quantity.

A second price-distributing influence which bids fair to have a powerful effect as the season advances is the manifest tendency of the exports of cotton from the United States to exceed the bounds fixed by the probable size of the crop. It will be remembered that last year foreign countries actually consumed 8,872,000 bales of American cotton, though the season's exports from the United States were only 7,733,177 bales. The difference of 1,139,000 bales was derived by the foreign spinners from a reduction of foreign mill and port stocks of American cotton to less than normal proportions. This expedient is unavailable this year, since the stocks of American cotton abroad do not permit it; hence all the signs point to an intention on the part of foreign consuming countries to draw their entire consumption this year, which cannot possibly be estimated at less than 8,500,000 bales, from the United States. So far, this programme has encountered no serious obstacles, as is shown by the magnitude of the season's exports to date. In fact, the hand-to-mouth buying policy of American spinners has greatly facilitated it. Evidently, however, it will be impossible to withdraw 8,500,000 bales from a crop of less than 14,000,000 bales— even allowing for the moderate carry-over of inferior cotton in this country at the beginning of the season— without leaving the American spinners in a most acute supply situation towards the end of the year; for competent authorities now estimate that mills in the United States will require at least 6,500,000 bales of American cotton to meet the demand for the goods they produce.





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## A Review of the 1927-28 Egyptian Cotton Season, and Prospects for 1928-29.

The firm of *J. G. Joannides & Co., Alexandria*, has issued its review of last season and of the prospects for 1928-29. This is full of interesting information, and we extract from it the following:—

### INTRODUCTORY REMARKS.

Legal restriction of the acreage under cotton was principally responsible for the reduced yield of the season under review. But when comparing the figures of the commercial crop (arrivals to the 31st July) with those of previous seasons it should be borne in mind that the arrivals in the previous years were gross weights, including tare (2 per cent.), whereas from the 1st September, 1927, all official statistics and estimates are in net lint weights, tare at 2 per cent. being deducted before publication.

According to the Statistical Department, arrivals for the 12 months to the 31st July, 1928, amounted to

Cantars.	
6,062,926,	of which
2,434,923	were Sakellarides
2,985,988	„ Ashmouni and Zagora
276,860	„ Pillion
223,446	„ Casulli, Fouadi, Maarad, Nahda, etc.
141,709	„ Scarto, Sekinas, Afrita, and other linters.

Owing to the legally enforced closing down of ginneries at the end of May, 1928, part of the 1927 crop has remained unginned up-country, and we estimate this residue at 220,000 cantars, the main part of which is Sakellarides from Lower Egypt.

This crop has been raised from an acreage estimated by the Ministry of Agriculture at 1,516,199 feddans, of which were planted in

		Feddans.
Sakellarides	... ..	795,740
Ashmouni and Zagora	... ..	599,149
Pillion	... ..	74,451
Other varieties	... ..	46,859

The decrease of 15·10 per cent. (269,500 feddans) on the previous season's cotton acreage is a result of the strict enforcement of the Acreage Restriction Law, which was promulgated to counteract the effect upon prices of the 1925 and 1926 bumper crops. There is no doubt, however, that some evasion of the law did take place; and many well informed authorities are disposed to consider a figure of 1,650,000 feddans as being nearer the truth.

In general, the average yield per feddan works out at

		Cantars.
Sakellarides	... ..	3.228 per feddan.
Ashmouni and Zagora	... ..	5.117 „
Pillion	... ..	3.718 „
Other varieties	... ..	4.077 „

*Uppers.* The Mississippi floods had created a feeling that all staple cotton, and especially Uppers, would be during this season keenly competed for by spinners. Anxiety was freely expressed regarding the sufficiency of the supply, and merchants were very cautious about committing themselves. For sentimental reasons holders maintained a firm attitude and contributed to the stiffness in the basis of all grades, which continued long after it was apparent that spinners were not going to be forced into paying a price out of proportion to the normal parity with other and competitive cotton.

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*Lower Egypt Zagora.* Although the insufficiency of this season's staple was apparent in this variety of cotton more than in any other, yet this cotton was moved into consumption easier than real Uppers, owing to its showiness compared to the leafy aspect of Ashmouni from Upper Egypt. Quantities of this cotton were shipped to the United Kingdom, where spinners seem to welcome it, notwithstanding the weak nature of its staple.

*Sakellarides.* It is an undoubted fact that the efforts being made to improve the quality of this growth are bearing fruit. In a season like the past, which will go down to history as one of the worst for quality of staple of all growths and varieties, Sakellarides showed, in our opinion, the least falling-off. It is true that complaints were many, but this was due, in the first instance, to the admixture of 1926 cotton, the fibre of which had naturally lost its elasticity and resistance, and, secondly, to the continuation of up-country practices, which are punishable by a law the observance of which was not always strictly enforced.

The declining price tendency in the basis of best Sakels which was noticeable since last season has continued during the whole of the year, and fully good, which stood at 7 tall. on during the first week of October, is now being offered freely without any offtake at 4 tall. This is a result not only of the Sudan Sakel competition but also of the wide span existing between low and high grades; during the past two seasons we have had, both here and in America, an abnormally large production of low grades, which had to sell at very low basis before it could be moved into consumption; and as, during the season under review, consumers of cotton were constantly fighting the advancing tendency of prices and seeking by every means to produce goods which would sell at, as near as possible, the 1926-27 level of price, it is easy to see why best Sakels found very few buyers at their high level of cost.

*Pillion.* The demand for this growth was good all through the year, and it was helped by the very reasonable basis at which the cotton was being offered. For a very long time F.G.F. sold at  $\frac{1}{2}$  to  $\frac{1}{4}$  on, and only towards the end of March did the basis for the medium grades start advancing as a result of the gradual exhaustion of stocks. At its highest F.G.F. sold at  $2\frac{1}{2}$  on, but the better grades were slow of sale, and although Extra touched 7 tall. on, the bulk of such grades sold at  $4\frac{1}{2}$  to 5 on.

The crop was unsatisfactory as regards staple.

*Maarad.* The demand for this growth was quite good for the medium grades up to Good, but the high grades moved off very slowly; at the end of the season the only grades in stock are of Fully Good and Extra. Spinners have been paying this cotton more attention as a result of the extensive advertisement given it by the various parties interested in its sale; but results obtained confirm previous opinions that its best use is to be found in wet yarns of high counts, where strength is of secondary importance. The cotton is also more neppy than Sakel.

*Nahda.* The larger production of this new variety was moved into consumption with the greatest ease, especially as the price basis was kept at a reasonable level compared to Sakels. Spinners confirmed unanimously the fine qualities of this cotton, which, if kept pure and free from mixture, is destined to become the bulk crop in the Delta, just like the old Mit-Adifi. Less waste in all the preparatory stages, a fine, silky, strong and even-running fibre, it provides the right sort of cotton as long as the price is not pushed beyond certain limits. The only disadvantage of this growth lies in its brown colour, which, of course, effectively prevents it being spun in mixture with Sakels; but such a failing can easily be remedied by producing such quantities of the cotton that it can be bought to spin alone.

*White and Casulli.* Although offering at a very attractive price below Sakels, these white varieties sold very slowly and at a constantly declining basis.

*Fouadi.* There was quite a fair amount of this cotton produced. Up to last season dealers attempted to pass it off as Sakel, and it must be admitted that they were successful to some extent; but increasing knowledge of the properties of this growth, both by spinners and merchants, have now established the real value of the cotton at about 1 tall. below the price of Nahda, although the cotton has none of the latter variety's sturdy qualities.

The cotton, when grown on very fine land, produces a remarkable staple, although it lacks lustre and resistance to the finger test, and is sought after principally because its similarity to Sakel (although much shorter) enables spinners to reduce the price of their mixings.

*Farouki.* A new variety produced in Upper Egypt this season, which has a remarkable staple length very similar to Pillion. The crop, so far, is of small proportions, but we believe that if the strain is maintained pure there is a great future before it.

*Government Stocks of Cotton.* Although prices advanced to such levels that the sale of its stocks could have brought in a handsome profit on its investment, the Government was prevailed upon not to sell its stocks, except to spinners if they applied for it. The only buyer, therefore, was the Textile Import Ltd. (Soviet), which, after long haggling, acquired 10,028 bales of Sakel and 2,772 bales of Uppers.

On information obtained from the buyers of Government cotton, and those who have sampled the stocks still unsold, we can say with confidence that about

40 per cent. of its Sakel stock is of very nice staple.

40 per cent. is of such current style as is easily obtainable on the market, even towards the end of the season.

20 per cent. is of rather soft staple, which has badly deteriorated with its long storage, and which will be unsaleable if kept for another season.

All the cotton, with few exceptions, has become brown through age; for although the storage arrangements have been as perfect as it is possible, and the cotton was kept in perfect condition, the warehouses being well aired every fortnight or so, it must not be forgotten that it was cotton bought in the open market, some of it especially mixed and prepared for sale to the Government, and probably in poor condition internally when first bought.

To our mind, this cotton must be sold at the first opportunity; otherwise an unpleasant surprise will await the owners when the cotton is offered for sale.

*Humidity in Cotton Shipments from Egypt.* This question was raised at the Zurich meeting of the Cotton Committee, although it had been agreed that the subject would be discussed at the Barcelona International Cotton Congress of 1929, when complete statistics could be presented by both sides. At the Zurich meeting figures were submitted by the Spinners' Federation of tests bearing on 29,657 bales made in various countries, but mostly in Switzerland, and which indicated a humidity content of 8.91 per cent. on the wet and on the average.

No figures were submitted by the Egyptian members, as they are to be presented at the Barcelona Congress, and rules have been framed by the Cotton Committee of the Alexandria General Produce Association on the procedure of conditioning, drawing samples, etc., which have been based on similar rules of the St. Gall conditioning establishment, in order to obtain standardized statistics. We would suggest that these rules be also accepted generally by spinners to facilitate comparisons and statistics.

Conditioning machines have also been installed by the Alexandria General Produce Association, which may be used for a nominal fee by those exporters who do not possess their own conditioning machine.

But all results obtained so far go to indicate that the complaints of overwatering have been exaggerated, and that the figures submitted at last year's Congress were not based on average, but on certain overdamp shipments. Let us hope that a full discussion of the subject will help to clear the atmosphere of this attitude of mutual suspicion and establish that it was another case of much ado about nothing.

*Business with Spinners.* Buying was conducted in a very leisurely manner all though the year, and even on marked and pronounced declines it was more a case of calling off cotton than of fresh buying which was in evidence. Many spinners were being supplied on old contracts made during the low prices of 1927; and many, more so than usual, bought their cotton "on call," and have not yet fixed it. The practice of buying on call has spread so much that we are quite unable to estimate, as in previous

years, the average price at which the trade has bought its cotton. We do not believe with the International Federation that the system is unsuited to Egyptian cotton buying by mills, but we fear that it is being carried too far, and used as a means of speculation instead of a means of assuring the mills' requirements at a reasonable basis; we believe that we are not far wrong in estimating the amount of uncalled cotton carried into next season at over 400,000 cantars, and at one time it was certainly over 900,000 cantars. Let us hope that spinners will not be blinded by their success this and last season and continue the same tactics every year, as we shall then have to regret a repetition of the disastrous results of 1924-25.

Russian purchases are again large, according to the figure of exports they took 66,110 bales against 67,800 last year.

A marked decline in the takings of Egyptian cotton has taken place this season, and exports are the lowest since 1922-23. Whether this is due to the high level at which Egyptian cotton sold compared to other growths or to the poor state of the textile trade is better left to our readers' appreciation.

#### WHAT ARE THE PROSPECTS FOR THE FUTURE?

Starting on the 1st August, 1927, with a carry-over of 394,000 bales, consisting of:—

	Bales.
Stocks in Alexandria ... ..	293,000
„ Liverpool and Manchester ... ..	58,000
„ in Continental ports ... ..	9,000
„ in Boston and U.S.A. ... ..	11,000
Afloat to various ports ... ..	23,000
	<hr/>
	394,000
To which add the commercial crop of 1927 .	808,400
	<hr/>
Total supply, 1927-28 season ..	1,202,400
	<hr/>

which we estimate to have been composed of:—

534,000 bales Sakellarides  
668,400 bales Uppers and other varieties

the world's takings during the past season amounted to 895,900 bales plus 7,600 bales local mill consumption, of which

390,000 bales were Sakellarides cotton  
and 513,500 bales Uppers and other varieties  
which left a carry-over on the 31st July, 1928, of 303,500 bales, of which

144,000 bales Sakellarides  
159,500 bales Uppers and other varieties,

distributed as follows:—

	Bales.
Alexandria ... ..	202,000
Liverpool and Manchester ... ..	52,000
Continental ports ... ..	7,000
Boston and U.S.A. ... ..	17,500
	<hr/>
Total visible supply ... ..	278,500
Afloat to various ports ... ..	25,000
	<hr/>
	303,500
To which add the probable crop of 1928 ...	930,000
	<hr/>
Total available supply during 1928-29 ...	1,233,500
	<hr/>

exclusive of any invisible up-country stocks which we have already estimated at 220,000 cantars.

# Egyptian Produce Trading Company

(S.A.E.)

14, *Rue Mahmoud Pacha el Falaki*

(P.O.B. 1608)

ALEXANDRIA (EGYPT)



FOREIGN REPRESENTATIVES IN ALL  
SPINNING CENTRES THROUGHOUT  
THE WORLD.



*President :*

HIS EXCELLENCY EMINE PACHA YEHIA



Cables : CONFIDENCE, Alexandria

Our estimate of a 930,000 bales yield is based on the Egyptian Government figures of the cotton acreage published recently, and which estimated that 1,738,472 feddans have been planted in cotton, of which

799,523 feddans under Sakellarides			
768,411	"	"	Ashmouni and Zagora
97,218	"	"	Pillion
25,883	"	"	Nahda
47,437	"	"	all other varieties.

Such an acreage would represent an increase of 222,000 feddans over last year, and the increase is mainly in the Uppers growth. We prefer to abstain from criticism of these figures; but merely mention that such an increase is entirely at variance with all private or other reports; which estimated the increase at a bare 5 per cent. It is rumoured, however, these figures, which we acknowledge to be very near the publicly accepted figures of the cotton acreage (much more so than last season), are merely a correction of last year's abnormally low estimate.

On such a basis we estimate provisionally the final yield at :

	Bales.
Sakellarides ... ..	335,000
Uppers and Zagora ... ..	500,000
Pillion and other varieties ... ..	95,000
Total ... ..	<u>930,000</u>

and obtain the following comparisons :

		1926-27		1927-28		1928-29	
		Supply	Takings	Supply	Takings	Supply	Takings
Sakels ...	639,000	430,000	534,000	390,000	479,000		
Uppers, &c.	786,000	601,000	668,400	513,500	759,500		
		<u>1,425,000</u>	<u>1,031,000</u>	<u>1,202,400</u>	<u>903,500</u>	<u>1,228,000</u>	-

Whilst the general supply of Egyptian is indicated as ample for all requirements, we remark that there is a reduction of 55,000 bales in the statistical supply of Sakellarides. At first sight, such a reduction is alarming, and would justify the optimism of our market regarding the future of Sakel prices. We consider that a calmer review of the matter is required. To balance the reduction of the Sakel supply there has taken place a reduction in the offtake, which is 40,000 bales lower than in the preceding year; and, on the other hand, we have now a formidable competitor in the shape of the Sudan Sakellarides, which is estimated to be much larger than in any previous season, owing to the increase of 20,000 feddans in this season's planting; besides which we must consider that the market has, to a certain extent, discounted this deficiency in the supply by raising the sale price of Sakellarides in the following way :

1925-26	Average sale price of Sakels over Uppers	979 pts. over NY	14.75
1926-27	" " " "	854 pts. " NY	13.93
1927-28	" " " "	1,058 pts. " NY	17.84
1928-29	so far premium of Sakels over Uppers	1,350 pts. " NY	18.00

We have during the coming season a larger supply of cotton keenly competitive with Sakels, such as Nahda and Fouadi, which existed in very limited quantities during the past three seasons, but which have displaced in many mills the too expensive Sakellarides. And we should not forget that a larger supply of Pillion means cheaper prices of this variety, which is so useful to the spinner in helping to cheapen his mixtures.

That Sakellarides is losing ground in public favour owing to its expensiveness is shown by the gradually accumulating supply of the higher grades which are unwanted and unsaleable; and we have had many instances of mills going off the higher grades in favour of the lower but cheaper grades. We would also point out that the consumption of Sakels would have been still smaller were it not for the part failure of the Sudan crop.

Competition of artificial silk is also getting keener and keener, and we have it on good authority that a reduction in the price of this silk is imminent owing to overproduction and accumulation of stocks, which must be moved faster.

On the other hand we understand that the Egyptian Government has declared publicly its intention to keep its stocks off the market; it has already published its scheme for advances to growers; and it is hinted that other measures will be taken to stay any further decline in the market.

All such measures are, however, harmful; and, like a boomerang, apt to recoil upon the thrower. We think that greater good would come to the country were the supply larger and better; and by increasing the circle of users create a better demand for our staple rather than restrict it to the select few who would plunge us in ruin were they suddenly to decide to go off its use altogether. We would draw the attention of our authorities to this gradual decline in the use of Egyptian Sakellarides.

As far as Uppers are concerned, there is no doubt that the very large supply of these, coming on top of the poor state of the trade, will in the no distant future cause a decline in the price basis. But we are very optimistic about this cotton, believing that the wide increase in the number of mills which can consume Uppers at a cheaper basis with Americans is bound to rapidly absorb all surplus supplies, and prepare the ground for a stronger statistical situation in the future. We have many examples of the interest shown, especially by Continental mills, in the purchase of Uppers based on American at a certain span, and we are confident that this interest will slowly increase.

It is satisfactory to note the increase in the supply of Nahda, which will be greatly welcomed by the trade, but even were the supply three times as large it would be all absorbed.

# ALEXANDRIA COMMERCIAL CO. (S.A.)

*Head Office* : 9, Rue Stamboul, ALEXANDRIA, Egypt.

*Telegraphic Address* "COMMODATE."

**CAPITAL** : L.E. 672.000

**RESERVES** : L.E. 270.000

## Board of Directors :

OSWALD J. FINNEY, *Chairman and Managing Director.*

S. LAGONICO, *Vice-Chairman.*

B. DELLAPORTA, *Manager.*

H. E. FINNEY, *Sub-Manager.*

HENRY CLARK, *Manager.*

R. E. WILLIAMS.

**Ginning Factories** : MEHALLA-KEBIR, ZIFTEH and MINIEH.

## Foreign Correspondents:

Reynolds & Gibson, Liverpool, England.	N. V. McFadden's Cie., Rotterdam, Holland.
W. H. Midwood, Liverpool, England.	
Geo. H. McFadden & Bro., Philadelphia, U.S.A.	James Heye, G.m.b.H., Bremen, Germany.
Raffaele Rietti, Milan, Italy.	Dir. Friedrich Kusel, Leipzig, Saxony.
Société d'Importation et de Commission, Havre, France.	Gosho Kabushiki Kaisha, Osaka, Japan
Walter Kuske, Winterthur, Switzerland.	Gosho Kabushiki Kaisha (Ld.), Bombay, India.
Joski et Cie., Ghent, Belgium.	

**Buying Agencies in the principal centres of Lower and Upper Egypt and the Sudan.**

Export of Cotton, classified by varieties, to various destinations from 1st August to 31st July inclusive.

(Quantities expressed in cantars)

	Sakellariadis	Per cent.	Ashmouni	Per cent.	Pillion	Per cent.	Other kinds	Per cent	Total including all varieties	Per cent.
United Kingdom ..	..	48.14	1,008,340	30.65	74,571	25.97	101,010	42.81	2,579,337	38.39
U.S.A. ..	..	8.48	656,568	19.96	2,785	0.97	4,036	1.71	909,552	13.54
France ..	..	14.49	345,862	10.49	26,436	9.21	37,750	16.00	829,712	12.35
Germany ..	..	2.41	226,196	6.86	69,748	24.29	39,863	16.89	405,906	6.04
Italy ..	..	5.84	231,784	7.03	7,558	2.63	11,071	4.69	419,666	6.25
Switzerland ..	..	3.02	153,349	4.65	36,672	12.77	20,655	8.75	298,289	4.44
Japan ..	..	4.35	94,159	2.85	33,115	11.53	751	0.32	254,181	3.78
Czecho-Slovakia ..	..	1.10	131,394	3.98	252	0.09	647	0.27	164,427	2.45
Spain ..	..	46.25	108,408	3.28	4,101	1.43	10,183	4.31	169,217	2.52
Poland ..	..	1.12	33,858	1.02	4,444	1.55	1,700	0.72	72,614	1.08
Austria ..	..	3.228	33,936	1.02	685	0.24	693	0.29	38,542	0.57
Belgium ..	..	0.23	9,585	0.29	37	0.01	1,044	0.44	17,620	0.26
Holland ..	..	8.928	9,848	0.29	15	0.01	—	—	18,791	0.28
Greece ..	..	2.861	2,915	0.08	—	—	4,005	1.70	9,281	0.14
British India ..	..	5.979	2	—	2,062	0.72	509	0.21	8,552	0.13
Portugal ..	..	1.541	1,447	0.04	—	—	—	—	2,988	0.04
Sweden ..	..	0.05	5,010	0.15	147	0.04	—	—	5,851	0.09
China ..	..	0.02	379	0.01	—	—	1,291	0.55	1,670	0.02
Palestine ..	..	—	—	—	—	—	323	0.14	328	0.01
Russia ..	..	8.40	238,437	7.23	24,515	8.54	155	0.07	505,891	7.53
Hungary ..	..	0.05	2,548	0.07	—	—	—	—	4,099	0.06
Other countries ..	..	0.01	1,771	0.05	—	—	299	0.13	2,212	0.03
Total ..	..	100	3,295,796	100	287,143	100	235,985	100	6,718,726	100

Cables : KUPPERUS-ALEXANDRIA

H. KUPPER

ALEXANDRIA (EGYPT)

*Cotton Merchant*

Central Buying Agency and Ginning Factory at  
Zifta (GHARBIEH)

Correspondents in all Textile Centres

Telegraphic Address :  
Augustino, Alexandria.

Codes :  
Bentley's ; Meyer's Atlantic, 39th edition ; Private code

P. AUGUSTINO &amp; CO.

*Cotton Brokers : : Stock Brokers*

Associate Members of the Liverpool Cotton Association

Alexandria, Egypt, P.O.B. No. 248

Special attention given to orders in Futures for spinners and manufacturers. Represented in all European spinning centres. Also execute orders in the Liverpool, New York and New Orleans Cotton Exchanges in connection with straddles in Alexandria.

SPECIALITY : "FUTURES"

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G. D. ECONOMOU &amp; CO.

*Cotton Brokers : : Stock Brokers*

6, Rue de l'Ancienne Bourse, 6  
P.O. Box 1870, Alexandria, Egypt

MEMBERS OF THE ALEXANDRIA COTTON EXCHANGE. MEMBERS OF THE ALEXANDRIA STOCK EXCHANGE  
ASSOCIATE MEMBERS OF THE LIVERPOOL COTTON ASSOCIATION, LTD.

Orders promptly and carefully executed for Straddles of Egyptian cotton on the Alexandria Exchange, against American or Egyptian on the Liverpool, New York and New Orleans Exchanges.

Ask for our booklet dealing with "The Egyptian Cotton Market."

Correspondence invited.

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**EXTRACTS FROM MARKET LETTERS.**


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*P. Augustino & Co.*, Alexandria, wrote on the 25th October, as follows:

During the immediate future a large advance is perhaps not very likely, as the movement of the crop is still very heavy, but, on the other hand, a large decline also looks improbable, there being a potential buying demand in the market waiting for lower prices. Purchases on any weak markets should give good results.

“Bears” have paid much attention to an estimate published recently by the Sudan Government, according to which the Sudan Sakel crop for 1928 is estimated to yield 572,112 cantars against the final result of the 1927 crop of 471,769 cantars. We do not think that an increase in the yield of only 100,343 cantars can be of great importance, the less so as the yield of Sakels in Egypt will be considerably lower than last year.

Private news about our Sakel crop continues to be pessimistic, and we can only confirm what we have written previously on the subject. The crop is already finished, and most of the cotton trees have been removed already from the fields.

---

# C. M. SALVAGO & CO.

## *Bankers, Egyptian Cotton Merchants and Exporters*

### ALEXANDRIA (EGYPT)

P.O.B. 393

:

:

:

Telegrams: “SALVAGO”

**AGENCIES:***Lower Egypt:*

MEHALLA-KEBIR, TANTAH &amp; KAHR-EL-ZAYAT

*Upper Egypt:*

MINIEH &amp; BENI-SOUF

**SUB-AGENCIES:***Lower Egypt:*

SHEBIN-EL-KOM, KAHR-EL-SHEIKH, TEH-EL-BAROUT &amp; BARRAGE

*Upper Egypt:*FAYOUM, WASTA, FASHN, DEIROUT, BIBEH, ABOU-KERKAS, BELEIDA, BOUSHI,  
MELLAWI, BENI-MAZAR, SAMALLOUT, ABOUTIC, SOHAG

*G. D. Economou & Co.*, Alexandria, wrote on the same date as follows :—

Pillion and Nahda has also been much sought after, the latter growth especially attracting spinners and selling at full prices. We consider that the future for this growth is brilliant, and even if a larger production should become available it would easily be absorbed, as it appears that spinners are obtaining very satisfactory results from this variety.

Maarad does not appear to enjoy such favour, and holders thereof are disillusioned as to the future of this description.

*The Alexandria Commercial Co.* wrote, on the 25th October, the following letter :—

There is no doubt that spinners do not care to pay current prices for Sakellaridis, and are only entering the market for this growth when necessity compels them to do so.

Reports from up-country on the final outturn of the Sakel crop continue to be conflicting. Basing ourselves on the data available, however, we estimate that the production will reach 2,250,000 to 2,500,000 cantars. There is certainly nothing abundant about this figure, but if we are to give credit to reports emanating from textile centres producing fine goods, it ought to be sufficient for requirements, inasmuch as there is available, in addition, the Sakel carry-over at the end of August of about 675,000 cantars (including 325,000 cantars held by the Government), and the supply of Sudan Sakel, estimated this year at 570,000 cantars, against 470,000 cantars last year. The approximate figure of the total available supply of all Sakel cotton, Egyptian and Sudan, for this year is therefore about 3,620,000 cantars, against about 3,935,000 cantars last year.

The development of the seasonable demand from the trade or its absence will, in our opinion, be the primary factor controlling the course of Sakel prices during the coming few weeks.

The Sakel-Ashmouni straddle (November-December) stands at 1,266 points, against 1,225 points last week and 838 points at this time last year.

*Reinhart & Co.*, Alexandria, on the 26th October, wrote as follows :—

Mill demand has been good from everywhere. A considerable amount of business has been booked, and important orders, being slightly below market price, are still pending.

English spinners were in the market for medium grades Sakellaridis and higher grades Pillion, Ashmouni and Zagora.

America continues to be a ready buyer of all grades of Uppers.

The Continent has bought large quantities this week, especially of high-grade cotton.

At any other time this good demand would have caused a substantial advance in prices, but the heavy arrivals on one hand and the apprehension of the American spinners' report on the other provoked a clearance of the bullish position and important sales of speculative character.

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**EXPORTS FROM EGYPT TO VARIOUS COUNTRIES.**


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UP TO 31st JULY OF EACH YEAR

	Season 1926-27	Season 1927-28
	bales	bales
United Kingdom .. .	436,560	353,610
France .. .. .	116,038	112,012
Poland .. .. .	7,521	9,661
Austria .. .. .	6,324	5,666
Italy .. .. .	57,279	57,610
Germany .. .. .	68,593	54,776
Spain .. .. .	22,685	22,680
Belgium .. .. .	4,963	2,505
Switzerland .. .. .	51,752	40,178
Portugal .. .. .	674	336
Holland .. .. .	2,990	2,392
India and China .. .. .	2,151	1,445
Japan .. .. .	41,126	34,580
Czecho-Slovakia .. .. .	24,187	21,353
Greece-Turkey .. .. .	2,681	1,492
U.S.A. .. .. .	153,430	121,055
Estonia .. .. .	2,935	2,565
Russia .. .. .	14,035	66,110
Sweden .. .. .	529	462
Hungary .. .. .	270	336
Others .. .. .	—	295
Total bales .. .. .	1,016,543	911,119

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# J. G. JOANNIDES & CO.

*Cotton Merchants*

## ALEXANDRIA (EGYPT)

With Buying Agency and Ginning  
Factory at 'TANTAH (Garbieh).

TRADE



MARK

Associate Member Liverpool Cotton Association.

*Represented in all Spinning Centres of EUROPE, GREAT  
BRITAIN, and U.S.A.*

**Cable Address :—“NANNIS,” ALEXANDRIA.**

ESTABLISHED 1863.

## COTTON EXPORTS FROM ALEXANDRIA DURING 1927/28 SEASON.

As compiled by the Alexandria General Produce Association

			Crs.
Arrivages à Alexandrie (Sacs et Balles) .. ..	..	..	6,022,444
À ajouter pour rectification de fin d'année.. .	.	..	74,378
			<u>6,096,822</u>
EXPORTATIONS D'ALEXANDRIE (par ports de débarquement)			
	Balles		Balles
Allemagne .. ..	26,577	{ Hamburg .. ..	26,521
		{ Brême .. ..	56
Angleterre .. ..	343,517	{ Liverpool .. ..	167,299
		{ Manchester .. ..	175,953
Belgique .. ..	3,431	{ Divers .. ..	265
Canada .. ..	200	{ Anvers .. ..	3,431
Espagne .. ..	21,901	{ Montréal .. ..	200
Esthonie .. ..	2,775	{ Barcelone .. ..	21,901
		{ Reval .. ..	2,775
Etats-Unis .. ..	128,324	{ Boston .. ..	117,909
		{ New York .. ..	10,325
France .. ..	114,986	{ Marseille .. ..	53,693
		{ Dunkerque .. ..	52,052
Hollande .. ..	11,855	{ Hâvre .. ..	9,241
Indes et Chine .. ..	1,525	{ Rotterdam .. ..	11,855
		{ Bombay, etc. .. ..	1,525
		{ Gênes .. ..	47,415
		{ Venise .. ..	47,041
Italie .. ..	151,354	{ Trieste .. ..	54,739
		{ Livourne .. ..	1,816
		{ Naples .. ..	343
Japon .. ..	34,432	{ Kobé & Yokohama .. ..	34,432
Portugal .. ..	665	{ Oporto & Lisbonne .. ..	665
		{ Leningrad .. ..	12,516
Russie .. ..	62,500	{ Odessa .. ..	49,984
Suède .. ..	627	{ Gothenbourg .. ..	627
Grèce et Syrie .. ..	1,166		1,166
Divers .. ..	110		110
		<u>905,945</u>	<u>905,945</u>
Total Balles, 905,945 = Crs. Nets, 6,666,204.			

## EGYPTIAN COTTON STOCKS.

RÉCAPITULATION			Crs	Nets
Stock à Alexandrie au 1er Septembre, 1927.. ..	..	..	1,780,000	
Arrivages .. ..	..	..	6,096,822	
			<u>7,876,822</u>	
Exportations .. ..	..	..	6,666,204	
Exportations échantillons (Douane) .. ..	..	..	1,071	
			<u>6,667,275</u>	
Consommation locale .. ..	..	..	53,318	
Détruit par incendie, environ .. ..	..	..	3,000	
			<u>6,723,593</u>	
Stock Net à Alexandrie au 31 Août, 1928 .. ..	..	..	<u>1,153,229</u>	
(y compris Crs. 364,329 appartenant au Gouv. Egyptien)				

## EGYPTIAN COTTON

## DÉTAIL DU STOCK AU 31 AOÛT, 1928

							Crs.
Achmouni	}						
Zagora							377,267
Sakellaris		..	..	..	..	..	683,633
Pillion		..	..	..	..	..	35,690
Nahda		..	..	..	..	..	1,630
Divers		..	..	..	..	..	61,842
Scarto		..	..	..	..	..	2,586
							1,162,648
					Moins tare	..	9,419
					Net	..	1,153,229

## GOVERNMENT STATISTICS:

TOTAL STOCK AS AT AUGUST 31, 1928, Crs. 1,153,229 NET.

		Sakellaris	Ashmouni and Zagora	Pillion	Other Varieties
of which	Crs.	678,095	374,211	35,401	65,522
Arrivals up to Oct. 17, 1928	..	372,400	1,172,007	90,897	41,993
	..	1,050,495	1,546,218	126,298	107,515
Exports up to Oct. 17, 1928	..	223,198	460,094	32,843	8,880
Stocks as at Oct. 17, 1928	..	827,297	1,086,124	93,455	98,635
or about	Bales	112,557	147,772	12,715	13,420

\* The weight is indicated in net Cantars; the cyphers of the preceding years have been altered accordingly.

## SUDAN COTTON CROP.

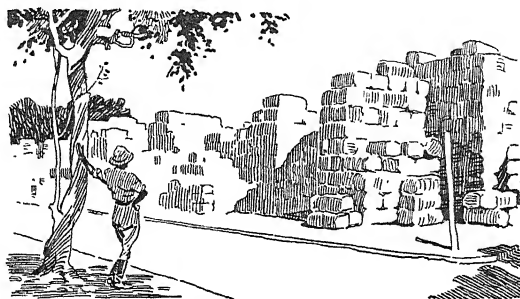
*The Liverpool Cotton Service* issued the following statement:—

At the date of our mid-season report (27th April) the Sudan Government's estimate of the crop was 470,540 cantars of Sakel and 70,483 of American cotton, both irrigated and rain-grown, making a total of 541,023 cantars, or 127,788 bales of 400 lbs. The figures were slightly reduced, especially for Sakel, by another estimate in May; but the final figures, dated 8th August, show a recovery in Sakel to 471,769, but a further reduction in American to 61,846, making the total 126,115 bales of 400 lbs. The following table gives the latest figures for 1927, and also the first estimate for 1928:

		1927 28	1928 29
	4/4/28	7/5/28	8/8/28 final (1st est.)
Sakel	Gezira .. ..	360,000*	340,000
	Tokar .. ..	50,793	50,793
	Kassala .. ..	53,000	60,000
	Total .. ..	470,540	457,424
American	Irrigated .. ..	49,365	48,186
	Rain-grown .. ..	21,118	20,745
	Total .. ..	541,023	533,615
	Bales of 400 lbs.	127,788	126,115
			155,497

\* Maximum: 315,000 was also given as minimum.

The relative position in Lancashire of the Sudan and Egyptian Sakel crops has undergone a considerable change this season. Last year Sudan was relatively cheap, and many Egyptian spinners went over to it to a large extent; but during 1927-28 the Sudan crop was not so good either in quantity or quality, with the result that Bolton spinners have not found it so attractive.



# East Indian Cotton.

## MIXING OF PUNJAB-AMERICAN COTTON.

The following letter has been received by us from the Secretary, Indian Central Cotton Committee, Bombay, and member-mills using Punjab-American cotton are requested to take note of its contents :—

Sir,—As you are aware, the Indian Central Cotton Committee has given much consideration to the question of mixing in Punjab-American cotton, which has now increased to such an alarming extent that it is almost impossible to obtain it pure. The difficulty of detecting small percentages of mixture has made the trade look with suspicion on all samples of pure cotton, with the result that it does not now fetch the price which its intrinsic value merits.

During the recent meeting of this Committee a conference took place between the representatives from the Punjab and Sind with members of the local Sub-committee to discuss this question. One of the stock arguments put forward was that mixing was done because the demand was for mixed cotton. I have already addressed you on this point, and received your emphatic repudiation of this assertion.

One of the findings of the conference mentioned above was that “the attention of the International Federation of Master Cotton Spinners’ and Manufacturers’ Associations, the Bombay Mill Owners’ Association, the Ahmedabad Mill Owners’ Association, and the Japanese Spinners’ Federation should be drawn to the support given to mixing by their members buying mixed cotton. The members of these bodies should be requested to give encouragement by paying a full price when pure cotton is available.”

My Committee feel that the practice of mixing is never likely to diminish until the pure cotton obtains the premium it fetched some years ago; and this was in their minds when they arrived at the above decision.

I have the honour to bring the above to your notice, and would request the co-operation of your Associations in helping to put a check on this malpractice, which is bound to lead to the deterioration in the quality of American cotton in the Punjab, and may ultimately lead to its complete abandonment.

In the meantime I assure you that my Committee will explore every avenue in its attempt to solve the problem, though, at the present juncture, it feels that considerable headway could be made with the co-operation of the trade without resorting to drastic measures, which are bound to meet with considerable opposition.

I have the honour to be, Sir, your most obedient servant,

J. H. RITCHIE,

Secretary, Indian Central Cotton Committee.

## TECHNOLOGICAL REPORTS ON

The Director of the Technological Laboratory of the Indian Central Cotton No. 16, price 2 Rs., in which he shows the behaviour of certain East Indian this report, but the cotton spinner when wishing to obtain from the shipper these trade the names given are not known.

We give the summary of the tests, and must leave it to the spinners to in the tests.

## SUMMARY OF TEST RESULTS ON

1	2	3	4	5	6	7	8	9	10	11	12	13	14
Sample No.	Cotton	Season	Counts Nominal	Mean Fibre-Length, Balls' Scorer (inch)	WASTE PERCENTAGES				RING FRAME PARTICULARS				
					Blow Room Loss	Card Room Loss	Spinning Loss	Total Loss	Yarn Breakages per 100 spindles per hour	Front Roller Speed, R P M	Front Roller Diameter (in.)	Draft	Turns per in.
62	Dharwar 1	1923-24	20	0.88	6.5	7.1	0.8	13.8	0	184	4.40	16.85	
72	"	1924-25	20	0.89	14.7	8.8	0.9	22.8	33	183	4.40	16.85	
128	"	1925-26	20	0.89	12.2	7.1	0.5	18.8	2	182	4.60	16.85	
245	"	1926-27	20	0.88	12.6	7.5	0.3	19.4	3	190	4.35	16.85	
373	"	1927-28	20	0.89	13.1	8.0	0.1	20.1	3	191	4.34	16.85	
70	Gadag 1	1923-24	20	0.90	5.0	7.0	0.8	12.3	13	183	4.60	16.85	
71	"	1924-25	20	0.82	8.4	8.9	1.3	17.5	35	183	4.35	16.85	
131	"	1925-26	20	0.83	8.8	8.6	0.6	17.0	10	180	4.70	16.85	
244	"	1926-27	20	0.80	6.6	7.5	0.3	13.8	3	192	4.44	16.85	
368	"	1927-28	20	0.86	5.5	7.9	0.1	13.1	3	190	4.67	16.85	
104	Surat 1027 A.L.F.	1923-24	20	1.00	6.4	8.0	0.6	14.3	10	182	4.13	16.85	
185	"	1924-25	20	0.95	5.2	7.6	0.4	12.8	0	181	4.00	16.85	
116	"	1925-26	20	0.92	5.3	7.3	0.7	12.7	15	182	4.13	16.85	
246	"	1926-27	20	0.97	6.2	7.3	0.5	13.3	10	192	4.40	16.85	
363	"	1927-28	20	0.95	3.6	7.7	0.3	11.3	0	190	5.01	16.85	
161	Wagad 4	1925-26	14	0.82	9.0	12.7	0.5	20.8	4	188	7.32	15.97	
272	"	1926-27	14	0.86	7.8	8.5	0.5	16.1	17	166	7.26	15.08	
371	"	1927-28	14	0.79	9.7	9.2	0.3	18.2	4	192	5.71	15.08	
160	Wagad 8	1925-26	14	0.80	8.3	12.9	0.4	20.3	14	174	6.85	15.97	
271	"	1926-27	14	0.80	7.4	8.4	0.5	15.5	4	166	6.90	15.08	
372	"	1927-28	14	0.77	9.1	9.8	0.1	18.0	0	192	5.50	15.08	
81	P. A. 4F	1924-25	20	0.81	8.0	7.3	1.3	15.8	23	180	5.27	16.85	
127	"	1925-26	20	0.81	6.7	6.5	0.4	13.1	3	180	4.60	16.85	
232	"	1926-27	20	0.79	9.6	9.5	0.4	18.4	10	191	5.32	16.85	
340	"	1927-28	20	0.79	6.5	7.9	0.4	14.1	38	187	5.21	16.85	
106	P. A. 285F	1923-24	20	1.04	10.4	10.3	0.8	20.1	0	182	4.13	16.85	
85A	"	1924-25	20	0.92	4.7	9.9	0.6	14.6	15	181	4.26	16.85	
115	"	1925-26	20	0.94	10.9	11.2	0.5	21.1	10	182	4.17	16.85	
233	"	1926-27	20	0.83	12.2	12.3	0.5	23.4	8	190	4.52	16.85	
367	"	1927-28	20	0.88	8.5	12.5	0.3	20.1	5	191	4.56	16.85	
180	P. A. 289F	1924-25	20	1.01	8.9	8.6	0.8	17.3	23	181	4.82	16.85	
130	"	1925-26	20	1.00	8.4	9.4	0.6	17.4	23	183	4.65	16.85	
234	"	1926-27	20	0.96	12.8	12.2	0.4	23.7	5	191	4.58	16.85	
341	"	1927-28	20	0.93	8.6	10.6	0.2	18.3	0	191	4.51	16.85	
122	Mollisoni	1925-26	8	0.72	5.1	7.8	1.2	13.4	0	174	5.07	12.07	
230	"	1926-27	8	0.68	7.1	8.3	0.3	15.0	15	185	4.83	12.07	
324	"	1927-28	8	0.73	4.0	6.8	0.4	10.8	20	200	5.53	12.07	

## STANDARD INDIAN COTTONS, 1928

Committee, Bombay (Mr. A. James Turner, M.A., B.Sc.), has published Bulletin Cottons in the process of spinning. Very valuable information is submitted in cottons will have great difficulty in buying the same or similar ones, as in the

ascertain from their cotton suppliers which varieties correspond to those noted

## STANDARD INDIAN COTTONS, 1923-28.

1	2	3	4	5	15	16	17	18	19	20	21	22	23	24	25	26	27	28
Sample No.	Cotton	Season	Counts Nominal	Mean Fibre-Length Balls' Sorter (in)	YARN TEST RESULTS										TEMPERATURE (°F)	RELATIVE HUMIDITY (%)		Highest Standard Warp Counts
					LEA					SINGLE THREAD								
					Counts Actual	Strength (lb)	Strength Irregularity (%)	Count-Strength Product	Strength (oz.)	Strength Irregularity (%)	Weakness Percentage	Extension (%)	Extension Irregularity (%)	Turns per in, actual		Spinning Room	Spinning Room	
62	Dharwar 1	1923-24	20	0.88 19.8	97.5	4.8	1,921	10.8	9.6	2.4	4.3	16.6	19.3	86	80	60	34	
72	"	1924-25	20	0.89 19.1	100.2	4.7	1,914	13.7	7.1	0	4.5	10.1	115.5	83	79	61	34	
128	"	1925-26	20	0.89 19.6	90.6	4.9	1,776	11.8	8.6	0.5	6.2	10.8	117.0	90	63	61	34	
245	"	1926-27	20	0.88 19.0	98.7	5.0	1,875	13.3	10.3	1.8	7.2	7.6	116.2	91	65	79	34	
373	"	1927-28	20	0.89 20.1	88.8	5.7	1,785	12.3	12.2	4.5	6.6	8.6	116.2	88	65	69	32	
70	Gadag 1	1923-24	20	0.90 19.8	86.0	6.7	1,703	10.2	9.7	2.8	3.6	14.4	118.9	84	77	55	36	
71	"	1924-25	20	0.82 19.6	59.7	6.6	1,170	9.4	7.4	0.2	4.9	9.6	115.0	83	76	64	30	
131	"	1925-26	20	0.83 19.6	75.7	6.3	1,484	10.7	12.5	4.3	6.1	11.7	118.4	91	87	63	30	
244	"	1926-27	20	0.80 19.5	99.4	4.0	1,938	13.5	11.7	3.3	7.9	7.7	116.1	91	63	82	35	
368	"	1927-28	20	0.86 19.8	94.2	5.3	1,865	13.0	9.0	1.8	7.3	8.2	116.3	88	65	67	35	
104	Surat 1027	1923-24	20	1.00 19.9	75.2	6.1	1,496	10.6	9.0	0	5.8	9.2	117.6	86	69	49	30	
83	[A.L.F.]	1924-25	20	0.95 19.3	90.0	4.1	1,853	10.9	9.6	1.0	5.0	11.6	120.6	86	70	64	32	
116	"	1925-26	20	0.92 19.9	72.9	9.0	1,451	11.0	11.9	4.3	5.7	9.5	116.5	86	65	65	26	
240	"	1926-27	20	0.97 19.6	88.2	4.3	1,729	12.3	8.5	0.3	6.7	6.7	116.3	89	64	65	32	
363	"	1927-28	20	0.95 20.0	79.1	7.0	1,582	10.6	9.8	2.3	6.0	7.9	116.5	85	59	65	30	
161	Wagad 4	1925-26	14	0.82 13.9	92.1	5.0	1,280	13.1	10.7	2.5	6.1	9.4	115.8	85	81	78	14	
272	"	1926-27	14	0.86 14.4	94.6	5.6	1,362	13.4	11.0	0.8	8.1	6.7	114.8	85	74	71	16	
371	"	1927-28	14	0.79 14.6	99.6	4.3	1,454	13.8	8.2	0	8.5	6.0	114.6	86	62	69	18	
160	Wagad 8	1925-26	14	0.80 13.8	84.7	7.6	1,169	12.5	9.9	1.5	6.3	9.8	114.7	87	81	83	12	
271	"	1926-27	14	0.80 14.0	88.5	6.1	1,239	11.9	12.9	5.5	8.0	7.3	114.9	87	76	72	14	
372	"	1927-28	14	0.77 14.6	88.8	4.7	1,296	11.9	10.0	2.8	8.5	9.1	114.8	88	63	70	14/16	
81	P. A. 4F	1924-25	20	0.81 19.3	65.1	6.9	1,256	8.8	13.7	7.0	4.8	17.5	118.0	73	75	62	22	
127	"	1925-26	20	0.81 19.5	67.8	7.3	1,322	9.3	12.4	5.5	5.3	16.3	116.2	91	63	59	22	
232	"	1926-27	20	0.79 19.8	75.2	4.6	1,489	10.2	10.8	3.5	9.0	6.7	116.4	88	63	78	24	
340	"	1927-28	20	0.79 19.4	66.6	6.5	1,292	9.3	13.5	6.5	7.5	10.0	116.4	81	69	65	22	
108	P. A. 285F	1923-24	20	1.04 19.3	100.1	4.8	1,932	12.6	9.9	2.0	6.6	9.2	118.0	84	69	57	34	
85A	"	1924-25	20	0.92 19.0	97.1	6.7	1,845	11.5	9.4	1.3	4.6	16.2	117.3	85	66	55	34	
115	"	1925-26	20	0.94 19.3	82.9	4.9	1,598	11.5	9.9	1.8	6.1	10.2	116.2	86	64	62	28	
233	"	1926-27	20	0.83 19.2	92.0	3.9	1,764	12.8	9.7	1.0	7.5	6.9	116.4	90	60	76	34	
367	"	1927-28	20	0.88 19.9	85.4	4.2	1,699	12.5	10.3	2.0	6.9	7.2	116.4	89	64	69	34	
80	P. A. 289F	1924-25	20	1.01 20.4	88.6	8.6	1,807	11.8	8.2	2.3	6.6	8.4	121.8	74	72	61	36	
130	"	1925-26	20	1.00 20.2	84.3	9.8	1,703	13.0	9.6	3.5	5.6	8.8	117.5	91	62	64	30	
234	"	1926-27	20	0.96 19.3	107.5	7.4	2,075	14.8	9.6	1.3	7.7	8.7	114.9	90	65	80	38	
341	"	1927-28	20	0.93 19.6	104.2	5.3	2,042	14.2	10.1	1.5	6.5	8.5	116.3	83	69	66	40	
122	Molhisoni	1925-26	8	0.72	8.0	76.6	10.3	613	13.1	11.8	2.4	7.5	12.7	112.6	85	61	68	6
230	"	1926-27	8	0.68	7.7	111.4	6.6	858	15.6	18.6	11.5	12.6	9.4	111.9	89	64	81	8
324	"	1927-28	8	0.73	7.9	101.8	8.5	804	13.6	16.4	11.5	9.0	8.6	111.9	83	66	68	8



COTTON EXPORTS FROM INDIA DURING THE SEASON  
(Custom House Official Clearances), September to August inclusive  
(*Sourra Ralli Brothers Circular, October 25, 1928.*)

SEASON 1927-28	Ralli Bros.	Volkart Bros.	Bombay Co., Ltd.	Japanese Firms	Other Exporters	Totals
Europe, etc.						
Bombay ..	125,982	165,097	20,408	117,954	382,397	811,838
Karachi ..	108,945	121,117	26,402	82,663	237,567	576,994
Calcutta ..	23,592	8,860	-	2,029	6,015	40,496
Tuticorin ..	9,216	10,627	2,804	3,818	1,430	27,895
Other Ports	16,757	48,680	7,877	—	846	74,160
	<u>284,492</u>	<u>354,681</u>	<u>57,491</u>	<u>206,464</u>	<u>628,255</u>	<u>1,531,383</u>
Japan, etc.						
Bombay ..	60,918	57,200	1,400	928,808	342,477	1,390,803
Karachi ..	35,800	24,086	2,900	129,540	25,538	217,864
Tuticorin ..	6,111	8,302	13,784	5,608	—	33,805
Other Ports	2,180	1,687	—	5,750	1,519	11,136
	<u>105,009</u>	<u>91,275</u>	<u>18,084</u>	<u>1,069,706</u>	<u>369,534</u>	<u>1,653,608</u>
Totals 1927-28	<u>389,501</u>	<u>445,956</u>	<u>75,575</u>	<u>1,276,170</u>	<u>997,789</u>	<u>3,184,991</u>
SEASON 1926-27.						
Europe, etc.	228,335	227,711	48,544	92,534	365,528	962,652
Japan, etc.	46,403	80,923	13,013	1,275,344	429,446	1,845,129
Totals ..	<u>274,738</u>	<u>308,634</u>	<u>61,557</u>	<u>1,367,878</u>	<u>794,974</u>	<u>2,807,781</u>
SEASON, 1925-26.						
Europe, etc.	283,325	296,047	68,193	150,506	413,620	1,211,691
Japan, etc.	124,783	174,941	15,238	1,727,318	180,567	2,522,847
Totals ..	<u>408,108</u>	<u>470,988</u>	<u>83,431</u>	<u>1,877,824</u>	<u>594,187</u>	<u>3,734,538</u>

### CONSUMPTION OF INDIAN COTTON IN INDIA.

According to the Department of Commercial Intelligence and Statistics, India, the following table shows the consumption of Indian cotton by Indian mills for the periods given, based on returns made under the Indian Cotton Cess Act:—

	(In bales of 400 lbs.)			Total consumption during corresponding period previous year (since 1st Sept., 1926)
	Consumption during July, 1928	Consumption during July, 1927	Total consumption since 1st Sept., 1927	
Bombay Island .. ..	1,089	57,152	434,123	692,802
Ahmedabad .. ..	25,886	20,095	272,448	242,769
Bombay Presidency ..	39,639	89,570	855,252	1,078,334
Madras Presidency ..	16,279	15,914	171,731	168,778
United Provinces ..	14,642	16,730	156,421	189,425
Central Provinces & Berar	10,171	9,292	106,609	101,728
Bengal .. ..	5,714	7,362	76,996	82,115
Punjab and Delhi ..	3,946	3,624	42,351*	36,992
Rest of British India ..	1,787	1,171	13,390	12,117
Total British India ..	<u>92,178</u>	<u>143,663</u>	<u>1,422,750</u>	<u>1,669,489</u>

\*Includes 42 bales for April not reported before.

The falling-off reflects the effect of the Bombay mill strike.

Stocks in Bombay are 681,000 bales, against 263,000 bales at this time last year. Exports are 200,000 bales in advance over last year.

## SECOND REPORT ON CROP 1928-29.

21,700,000 acres are planted, as compared with 20,502,000.

The second report points to the likelihood of a larger acreage this year than last. In 1927-28 the final acreage was 24,722,000, but the record figure was registered in 1925-26, viz., 28,491,000 acres. It is only in December when a quantitative estimate is published.

### COTTON IN PUNJAB, INDIA.

Irrigated cotton in Punjab, India, is reported to be average to good, and unirrigated cotton generally below average, according to a cablegram received from the International Institute of Agriculture at Rome. Damage by floods and insects is reported from some districts. Picking has commenced, and will continue until January. Punjab produces on an average about 8 per cent. of the cotton crop for all India. About 75 per cent. of the area under cotton in this province is irrigated.



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# COTTON GROWING

## IN NEW COUNTRIES

### ARGENTINE COTTON CROP, 1927-'28.

According to calculations of the Department of Rural Economy and Statistics, the Argentine cotton production for the agricultural year 1927-28 amounts to 73,410 metric tons, distributed as follows:—

Chaco . . . . .	68,106 tons.
Corrientes . . . . .	4,306 „
Other provinces and territories . . . . .	998 „
Total . . . . .	73,410 tons.

The production of seed cotton for the last five agricultural years, according to the above Department, is as follows:

1923-24 . . . . .	43,860 tons.
1924-25 . . . . .	51,105 „
1925-26 . . . . .	103,263 „
1926-27 . . . . .	54,165 „
1927-28 . . . . .	73,410 „

The fibre produced up to the present, although of good type, is defective in colour and humidity, caused by the climatic conditions during growth, but accentuated by negligence of the grower, the picker, the receiver and the ginner.

The cotton-seed is of inferior quality, but if good weather continues in the producing zones the fibre, as well as the seed, will improve in quality.

The Department referred to states that the economic results of the crop to the growers are favourable, due to the good yields, the absence of pests, and also to remunerative prices being paid for the product.

### BRITISH EAST AFRICAN DEPENDENCIES.

His Majesty's Eastern African Dependencies Trade and Information Office has received the following unofficial but reliable information by cable from East Africa to the effect that the final figures of seed cotton bought by the ginneries is 80,180 tons.

The number of bales ginned to the middle of September is 134,700, the number of bales booked at stations and ports in Uganda up to September 1 is 130,500, and the number of bales exported from Mombasa up to the end of July is 124,550.

With regard to the new crop, the plantings recorded in the Eastern, Buganda and Northern Provinces up to the end of August total 654,000 acres, as compared with 530,000 acres in 1927, and favourable weather is reported to be general.

H.M. Eastern African Dependencies Trade and Information Office has received the following unofficial but reliable information by cable to the effect that the final ginnings of Uganda cotton amount to about 130,000 bales.

With regard to the new crop, the acreage planted is estimated to be approximately 601,000 against 553,000 last year.

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### COTTON PRODUCTION IN BRAZIL.

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*Source: Boletim Algodoeiro, S. Paulo.*

The following is a table showing the cotton production of Brazil: —

Years	Cotton in kgs.	Cotton used for domestic purposes in kgs.	Estimate of total production in kgs.
1901-02 .. ..	35,637,000	7,127,400	42,764,400
1902-03 .. ..	56,977,000	11,395,400	68,372,400
1903-04 .. ..	53,118,000	10,623,600	63,741,600
1904-05 .. ..	58,593,240	11,718,648	70,311,888
1905-06 .. ..	79,209,380	15,811,876	95,051,250
1906-07 .. ..	75,520,176	15,104,035	90,624,211
1907-08 .. ..	50,129,772	10,025,954	60,155,726
1908-09 .. ..	57,508,180	11,501,636	69,009,816
1909-10 .. ..	58,593,240	11,718,648	70,311,888
1910-11 .. ..	61,452,564	12,890,512	77,343,076
1911-12 .. ..	65,103,600	13,020,720	78,124,320
1912-13 .. ..	75,520,176	15,104,035	90,624,211
1913-14 .. ..	86,153,764	17,230,752	103,384,516
1914-15 .. ..	83,983,644	16,796,728	100,780,372
1915-16 .. ..	61,190,000	12,238,000	73,428,000
1916-17 .. ..	60,832,743	12,166,548	72,999,291
1917-18 .. ..	74,715,367	14,943,073	89,658,440
1918-19 .. ..	73,440,130	14,688,026	88,128,156
1919-20 .. ..	83,207,071	15,641,414	99,848,485
1920-21 .. ..	86,052,661	17,210,533	103,263,200
1921-22 .. ..	91,078,573	18,215,714	109,294,287
1922-23 .. ..	119,870,198	23,974,039	143,844,237
1923-24 .. ..	172,000,000	32,500,000	204,500,000
1925-26 (estimated)	147,920,000	29,581,000	177,504,000
1926-27 (estimated)	97,276,420	19,455,764	117,731,704

## COTTON GROWING

## PRODUCTION PER STATE IN KILOS

	1920-21	1921-22	1922-23
Amazonas ..	40,981	18,341	63,100
Pará ..	1,082,228	1,154,461	1,559,574
Maranhão ..	10,935,126	11,106,302	10,885,316
Piauí ..	2,349,300	2,637,121	2,720,087
Ceará ..	15,981,679	15,777,075	16,561,650
R. G. do Norte ..	8,160,009	10,141,140	12,385,477
Parahyba ..	11,726,225	12,448,376	13,098,148
Pernambuco ..	10,221,630	11,160,553	12,751,353
Alagoas ..	7,388,030	6,835,121	6,740,047
Sergipe ..	4,625,160	4,863,200	5,008,120
Bahia ..	2,854,716	2,801,871	3,411,177
Espírito Santo ..	..	74,263	96,498
Rio de Janeiro ..	..	81,681	103,475
Minas Geraes ..	6,438,180	6,550,040	6,695,062
São Paulo ..	21,559,336	22,805,033	24,836,472
Paraná ..	..	298,404	285,206
Goyaz ..	..	118,398	115,318
Others ..	..	..	..
Total ..	103,263,200	109,291,987	119,599,180
Bales ..	458,947	485,462	535,180

It is not only the mixing of different seeds which is responsible for the falling-off in the crop. One cannot help but trace in these figures that from 1921 to 1924 the cotton growing States were roused to a recognition of the great possibilities which the country possesses by the work of the cotton mission that visited each State, which culminated in the holding of an International Cotton Congress in Rio de Janeiro. Brazilians are apathetic and require stimulants in order to keep up continuity of efforts.

In the statistical chapter of this issue will be found a table showing the production of the smaller cotton producing countries.





## Japan and Its Cotton Trade.

Mr. W. B. Cunningham, late British Consul at Osaka, Japan, addressed on October 9 the China Section of the Manchester Chamber of Commerce, to which representatives of the Joint Committee of Cotton Trade Organizations had been invited. The *Manchester Guardian* reported on the meeting as follows:—

Mr. Cunningham briefly traced the growth of the cotton industry in Japan in recent years. The capitalization had grown from 113 million yen in 1913 to 304 million yen in 1920, an increase of 270 per cent. About three-quarters of the capital was paid up. During the same period the number of spindles had increased by 55 per cent. and the number of looms by over 100 per cent. The prosperity of the cotton industry reached a peak in 1920, largely owing to the fact that during the war such markets as South America, India, Dutch East Indies, and Africa could no longer obtain supplies from Great Britain. After 1920, Japan suffered from the post-war slump, especially in the markets mentioned, but by the end of 1921 she had to a large extent recovered. At the end of 1927 the capital invested in the cotton industry was 535 million yen, 391 million being paid up; spindles amounted to over six million, and there were more than 78,000 looms. The reserve funds of 64 companies amounted to 238 million yen, or about 60 per cent. of the paid-up capital.

In regard to the organization of the industry, Mr. Cunningham mentioned the Japan Cotton Spinners' Association. This association, which was formed about 40 years ago, was one of the most important of its kind in Japan, controlling about 90 per cent. of the spindles and 40 per cent. of the power looms. Of the total number of members there were four of outstanding importance, 10 rather smaller but still powerful firms, and about 40 firms which, though relatively unimportant individually, in the aggregate contributed considerably to the prosperity of the industry. Further, most of the importers of raw cotton and exporters of piece goods were associate members of the Association.

### STRENGTH IN COMBINATION.

Mr. Cunningham laid stress on the way in which the various interests were combined and concentrated. This, he considered, was one of the main reasons for the strength of the industry as a whole, since the large importers of raw cotton were also the principal

exporters of piece goods and were more or less directly interested in the actual production of the goods.

Another cause of the strength of the industry was that labour conditions were simpler than in this country. Mr. Cunningham's impression, however, was that there was not a great deal of difference in total production costs after allowance had been made for the greater number of operatives required in Japan, as well as the extra cost of housing, feeding, welfare, and recruiting from the country districts. The textile trade had an abundant reservoir of labour to draw from. Operatives did not, as a rule, stay long, the average term of service of female operatives being rather less than 18 months. This system had an advantage in that in times of depression the position could be easily adjusted by relaxing the recruiting of new hands.

A further cause of the rapid expansion in the cotton trade was the concentration on standard lines, which were comparatively simple to make yet filled the demands of the markets which the Japanese were trying to capture.

A matter of importance was the increase in the manufacture of textile machinery. Looms had been made for many years, but until recently the manufacture of spinning machinery had not met with much success, though more attention was now being paid to this industry. Progress had also been rapid in other allied industries; the development of hydro-electric power had made rapid strides, as had also the manufacture of tools and machinery of all kinds.

#### A BID FOR WORLD TRADE.

As regards future prospects, said Mr. Cunningham, it should be realized that Japan had made industrialization a settled policy, and was determined to secure as large a share as possible of world trade. In regard to cotton there was a marked tendency to go on to finer goods, and during the last few years exports of yarn had declined owing to concentration on the manufacture of piece goods.

Mr. Cunningham referred to the new factory legislation which would come into force in July, 1920. This was causing the mills considerable concern. Whereas they were now working two shifts of ten hours they would have to confine their activity to two shifts of eight and a half net, and that only if they could obtain an extension of one hour, the possibility of which was provided for. In regard to wages he felt that there was more likely to be an increase than a decrease.

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## Japan Cotton Mill Industry.

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In a *Report on Economic Conditions in Japan*,<sup>1</sup> to June 30th, 1928, the British Commercial Attaché, G. B. Sansom, C.M.G., and H. A. Macrae, M.A., Acting Commercial Secretary, H.M. Embassy,

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\* Published by the Dept. of Overseas Trade, London, obtainable at 3/2, post free, Adastral House, Kingsway, London, W.C. 2., or York Street, Manchester.

Tokio, publish a survey of the imports and exports of Japan. As to the exports of cotton yarn and cloth the authors say:—

The export of cotton yarn, according to customs figures, has been as follows:

						Quantities (1,000 lbs)	Values (1,000 yen)
1925	..	..	..	..	..	123,079	123,117
1926	..	..	..	..	..	81,398	70,716
1927	..	..	..	..	..	46,592	38,794
Jan.-May							
1927	..	..	..	..	..	24,757	18,546
1928	..	..	..	..	..	13,230	11,496

The very striking decline in 1927 and the first part of 1928 represents diminished export to all foreign markets, but the drop in sales to China and to British India is the most pronounced. As regards China it is due to civil disturbances and to boycotts against Japanese goods in many districts, combined with falling silver prices. As regards British India, the enforcement of a revised Indian tariff upon cotton yarns curtailed exports from Japan after September, 1927, but the decrease was also due in part to dumping of Chinese yarns in Indian markets, disturbed conditions in China having reduced consumption of yarns spun in China. These facts combine to show the importance to Japan of the China market. The figures are instructive:

VALUE OF COTTON YARN EXPORTS (IN MILLION YEN) TO

		China	Kwantung	Hong Kong	British India
1925	..	52.07	2.09	20.75	38.71
1926	..	25.70	1.19	8.09	28.08
1927	..	9.20	.86	3.64	20.04
1927 (Jan.-May)		5.04	.44	2.06	9.08
1928	..	4.18	.36	2.22	3.35

The decline in quantities in 1927 was not so heavy as the decline in values, since yarn prices fell heavily in that year; but examination of such figures as are now available shows that there was a further and heavy decline in quantities in the first five months of 1928.

The export trade in cotton tissues was in value smaller than in the preceding years, the total for 1927 being 383 million yen, as against 416 million yen in 1926 and 432 million yen in 1925. Values of exports to China (including Kwantung and Hong Kong) were:

									(1,000 yen)
1925	..	..	..	..	..	..	..	..	234,091
1926	..	..	..	..	..	..	..	..	220,481
1927	..	..	..	..	..	..	..	..	166,194
1927 (Jan.-May)	..	..	..	..	..	..	..	..	59,546
1928	..	..	..	..	..	..	..	..	87,653

While exports to China diminished slightly in volume the total exports increased slightly in quantity, despite the large drop in values. The total export of 13 types of cotton cloth which represent about 90 per cent. in value of all cotton tissues exported was

1,378 million yards in 1927, as against 1,331 million yards in 1926. The export value of cotton tissues to British India rose in 1927 to 86 million yen, as against 70 million yen in 1925. There is no marked variation in the values of exports to other countries, unless it be an increase from 22 million yen in 1925 to 33 million yen in 1927 in the value of cotton goods (other than cotton hosiery) sent to African countries.

It may be asked whether the Japanese cotton industry has not been weakened by these lean years in the export trade, particularly in the case of the yarn spinners. The following statistics, extracted chiefly from the latest returns of the Japan Cotton Spinners' Federation, give the best answer to this question:

1. The working spindleage has been reduced by output restriction agreements among the members of the Federation. The average for 1926 was 5,002,032, giving a yarn production of 2,607,740 bales in the year as against 2,530,602 bales in 1927. In May, 1927, the working spindleage was reduced to 4,072,715, and in 1928 it has so far been as follows:

January	..	..	..	..	..	..	1,702,892
February	..	..	..	..	..	..	4,673,027
March	..	..	..	..	..	..	1,677,424
April	..	..	..	..	..	..	4,691,707

It is probable that this reduction in working spindleage has in some ways facilitated preparations for the abolition of night work by July 1st, 1929. Certain of the larger spinning companies have already made experimental re-arrangements of shifts and spindleage with this end in view.

2. The export of yarns spun by companies belonging to the Federation fell from 203,000 bales in 1926 to 115,000 bales in 1927, but exports, important as they are, form only a small proportion of the output. Domestic consumption of yarns for these two years was 1,663,000 bales and 1,682,000 bales respectively (and these figures exclude yarns used by spinning companies in their own weaving departments). The mills which manufacture for export are as a rule the largest mills, belonging to companies with strong reserves.

3. The market prices of shares in the principal cotton companies are well maintained, as witness the following returns of April, 1928, transactions on the Osaka Stock Exchange:

Oriental Spinning Co., 50-yen shares, fully paid up.			
(Dividend for last term, 25 per cent.)	...	...	108
Kanegafuchi Co., 50-yen shares, fully paid up. (Dividend			
for last term, 35 per cent.)	...	...	258

Other spinning shares fetched from 112 yen to 164 yen for a fully paid 50-yen share. There is no doubt that the cotton industry is going through a difficult period, and the position of small companies is insecure; but the larger companies have substantial reserves which enable them to tide over bad years.

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## Japanese Cotton Mills. Visit by Prominent Lancashire Manufacturer.

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An address on " Impressions of the Cotton Trade in the Far East " was given by Mr. George Green, of Padihani, at the Blackburn Chamber of Commerce, on October 10.

Mr. Green, who has recently paid a visit to Japan and China, said that in one mill which he inspected there were 1,008 automatic looms. The looms were running well, and he was informed when he left that a weaver could run 48 looms, although he never saw any. From what he saw he gained the impression that they were running 20 looms each. They were producing very good cloth, and were getting 95 per cent. efficiency. They were all weaving coarse plain stuff, about 36 ins. wide, and, on his timing, the looms were running 180 picks a minute. The cloth was a very high standard, and was well woven.

The mill was running two shifts of ten hours each. In the preparation departments in the various mills he visited he found that they were almost replicas of the Lancashire mills. The warping and winding were practically the same, and everyone seemed quite as efficient as in Lancashire.

In another mill he saw fine goods being manufactured. With regard to this class of goods, they were yet " going slowly," and gradually getting on to better stuff. They were taking great care and spending a lot of time in order to get good quality. In the manufacture of these fine goods they formerly worked two shifts, but they had now cut off the night shifts, as they found the quality suffered.

Most of the large firms in Japan were experimenting with automatic looms, and evidently they had found it sufficiently profitable. They were hoping to run 48 looms to one weaver before long.

Referring to wages, Mr. Green said that in his estimation it seemed that the wages costs in Japan were about 40 per cent. less than in this country. That applied to the best mills, but in the country districts the wages paid were even less. In Japan the employer took a great interest in his workpeople, who seemed fairly well dressed - certainly above the average of the rest of the country.

Speaking of the advantages which the Japanese had over this country, he mentioned the longer hours that the machinery was kept at work. They had two shifts, and some mills worked seven days a week. Sunday working, however, had now been abolished by the best companies, although it still prevailed in the majority of the mills.

The wages were lower, and there were no restrictions from trade unions. There was much cheaper finishing, and they were nearer to their markets. The workers were equally as efficient as ours, and appeared contented and cheerful. There was less competition in their exchange than in ours.

Mr. Green also gave his impressions of the mills he visited in China, and mentioned that the cost of labour there was very low.

It was so low that even Japan was now feeling the effects of the Chinese competition. The standard of cloth was generally good, and produced at a very low cost.

Referring to competition, he said there would have to be some alteration somewhere before we could compete in the coarser cloths in China. It was evident to him that we should have to reduce our costs of production somewhere, and it was desirable to develop more in the way of automatic machinery. Yet it was no use running automatic machinery for 48 hours in competition with them. There would have to be a lot of restrictions taken off before we could overcome the competition. The competition in finer cloths was very small, but the Japanese were a race that plodded away, and were not without brains.

He thought the Japanese would touch us in some way in the finer counts unless we tried to keep in front of him. We should have to alter some of our ideas, and we should have to use machinery more than we did. He would not like to see the conditions of labour like they were in China, nor to see the workpeople working all day; but we should have to reduce our costs somewhere. He could only see us doing that by developing the automatic system, and by having two shifts of eight hours a day.

## COLOMBIAN TEXTILE INDUSTRY, PRODUCTION FOR 1927.

The following statistics are taken from the official returns of the Statistical Section of the Ministry of Industries:—

Number of factories	...	...	...	...	...	16	
Capital and reserves	...	...	...	...	...	8,220,369	pesos
Capital invested in machinery and buildings	...	...	...	...	...	4,693,755	"
Number of persons employed	...	...	...	...	...	3,285	
Average daily wage :—							
Men	...	...	...	...	...	1.69	pesos
Women	...	...	...	...	...	0.73	"
Children	...	...	...	...	...	0.49	"
Daily hours of work	...	...	...	...	...	9	
Raw cotton consumed :							
Colombian grown	...	...	...	...	...	2,065,036	kgs.
Foreign grown	...	...	...	...	...	1,245,316	"
Total	...	...	...	...	...	3,310,352	"
Production :—							
Type of yarn	...	...	...	...	...	From 4 to 50/2	
Various articles, i.e.,	...	...	...	...	...	1,708,188	kgs.
blankets, towels, etc.	...	...	...	...	...	1,268,100	"
Total	...	...	...	...	...	2,976,288	"
Comparison of raw material and products :							
Cottons used	...	...	...	...	...	3,310,352	kgs.
Products	...	...	...	...	...	2,856,466	"
Difference by waste	...	...	...	...	...	453,886	"

Percentage of waste	...	...	...	...	14 per cent.
Annual sales, for 1927	...	...	...	...	4,602,160 pesos
Total of various cloths produced	...	...	...	...	15,012,737 yards
Total of other articles, i.e., underclothing, shawls, blankets, towels, etc.	...	...	...	...	220,003 dozen
Average rate of exchange	...	...	...	..	4.95 to £1.

## German Cotton Manufacturing Industry during First Half of 1928.

(Article based on Reports of U.S. Consul-General A. T. HABERLE, Dresden, and Consul LESLIE E. REED, Bremen, and published in U.S. Commerce Reports, September 17, 1928.)

During the first half of 1928 the United States exported 700,180 bales of cotton, including linters, valued at \$81,001,000, to Germany, whose takings were only exceeded by shipments to the United Kingdom, amounting to 865,950 bales, with a value of \$90,553,000. In the first six months of 1927 this order was reversed, and Germany led all other countries with purchases of 1,270,371 bales, valued at \$90,139,000. The German cotton-manufacturing industry, therefore, is of considerable interest to growers, exporters and manufacturers of cotton in the United States.

### GERMAN IMPORTS OF COTTON DECLINE.

German imports of all classes of cotton declined from 1,203,136 bales (270,238 metric tons) in the first half of 1927 to 940,198 bales (103,078 metric tons) in the first six months of 1928—a loss of 28 per cent. on the basis of weight. Of the aforementioned cotton imports the United States supplied 1,102,531 bales (231,343 metric tons) in the 1927 period and 743,766 bales (152,315 metric tons) in the 1928 half-year. Imports of Egyptian cotton also decreased from 13,360 metric tons in the first half of 1927 to 10,010 in the first six months of 1928, while, in contrast, receipts from British India rose from 18,723 metric tons to 25,054.

Re-exports of raw cotton from Germany increased from a total of 36,476 metric tons for the first half of 1927 to 39,997 in the first six months of 1928. Of the 1928 exports, 13,461 metric tons went to Czecho-Slovakia, 12,165 to East Poland, 4,235 to Austria, 2,101 to the Netherlands, and 1,502 to Sweden. Smaller shipments were made to other Continental countries and Great Britain.

### COTTON STOCKS AT BREMEN DECLINE.

Stocks of raw cotton at the port of Bremen, through which most of the cotton enters Germany, declined from 609,027 bales at the end of 1927 to 424,709 on July 7, 1928, and to 296,000 on September 1.

Bremen cotton importers, particularly those accustomed to supply the German market, complained of poor business during the

first quarter of 1928. A slight improvement occurred during the second half of April, but the import business was again slow in May, at which time only that cotton most urgently needed was bought. Throughout June the Bremen raw-cotton market was influenced by the stagnation of business in the cotton consuming industries. Such orders as were placed were generally for immediate requirements.

#### GERMAN COTTON MILLS REPORT LACK OF FORWARD ORDERS.

During the first half of 1928 both spinning and weaving mills in Germany suffered from a lack of forward orders. Some mills curtailed operations, while others worked for stock.

The principal centres of cotton spinning in Germany, according to the official census for 1926, are as follows: Prussia, with 4,107,000 spindles, of which 3,400,000 are in the Rhineland-Westphalia district; Bavaria, 2,372,000 spindles; Saxony, 2,303,000; Wurttemberg, 1,012,000; and Baden, 504,000. The total number of spinning spindles in Germany in 1926 was placed at 10,417,000; in addition, the country had 1,131,000 twisting spindles.

During June the Saxon, Bavarian, and Rhinish cotton spinning mills laboured under a severe business depression. Prices obtainable for yarns were not considered commensurate with the cost of raw cotton. The spinning mills in the Muenchen-Gladbach district, Rhineland, which were fairly well occupied during May, were not satisfied with business during June, although a number of mills producing inferior qualities of yarn were kept busy. Working hours were reduced in some South German spinning mills in which excessive stocks had accumulated. Thread mills in this section also reported a stagnation of business in June. Spinning mills in Westphalia suffered from a lack of orders and found it necessary to work for stock during June.

#### FOREIGN COMPETITION HANDICAPS WEAVING MILLS.

German weaving mills experienced a severe depression from the end of 1927. Orders were scarce, and despite an advance in the cost of cotton and an increase in wages, prices obtainable for cotton fabrics declined. Mills producing coloured goods complained that throughout June practically no demand existed for any type of goods they produced, and that, owing to poor business in the preceding five months, large stocks of goods had accumulated. Competition from Alsatian weavers in the domestic market and from other Continental countries in foreign outlets for German fabrics is given as one of the chief causes of the present difficulties of the German weaving mills. Mills in the Lausitz district, Saxony, producing cotton-waste blankets, have been adversely affected by competition from French, Belgian and Netherland mills in some of the principal export markets.

#### PRINCIPAL SOURCES OF GERMAN IMPORTS OF COTTON YARNS.

During the first half of 1928 Germany imported 28,273 metric tons of cotton yarns, of which 20,658 tons, or 73 per cent., consisted of single grey or unbleached yarn. Counts up to and including 32's accounted for 55 per cent. of the imports of grey singles, counts 33's to 47's inclusive for 16 per cent., and counts above 47's for the remaining 20 per cent. Imports of grey soft-twist ply yarn, the next

largest item in the import trade, were only about a third as large as those of single grey yarns. Of the 6,716 metric tons of soft-twist ply yarn, grey or unbleached, imported in the first half of 1928, 3,013, or 58 per cent., were in counts above 47's.

Czecho-Slovakia, France, Switzerland, Alsace-Lorraine and Italy are the leading sources of German imports of unbleached yarns in counts up to and including 47's. In finer yarns Great Britain occupies a dominant position, having supplied 80 per cent. of the single grey yarns and 96 per cent. of the grey soft-twist ply yarns imported in the first half of 1928.

#### IMPORTS OF GREY YARNS TABULATED.

German imports of single and soft-twist yarns, not bleached, dyed nor printed, by counts and principal countries of origin, are summarized in the following table:—

GERMAN IMPORTS OF UNBLEACHED COTTON YARNS BY COUNTS AND COUNTRIES DURING THE FIRST SIX MONTHS OF 1928.

Countries of origin	Single grey yarns			Soft-twist ply yarns, grey		
	Up to 32's	33's to 47's	Above 47's	Up to 32's	33's to 47's	Above 47's
	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons
Alsace-Lorraine .. ..	782	820	18	8	18	10
Austria .. ..	619	28	—	136	—	—
Belgium .. ..	492	—	—	441	—	—
Czecho-Slovakia .. ..	3,611	30	18	512	—	—
France .. ..	2,495	1,153	36	397	71	20
Great Britain .. ..	365	593	5,306	127	328	3,752
Italy .. ..	1,271	175	—	287	216	—
Switzerland .. ..	1,303	437	423	89	36	95
Other countries .. ..	403	139	141	126	11	36
Total .. ..	11,341	3,375	5,942	2,123	680	3,913

#### GERMAN IMPORTS AND EXPORTS OF COTTON FABRICS INCREASE.

German imports of cotton fabrics rose from 9,846 metric tons for the first half of 1927 to 10,431 in the first six months of 1928, while exports also showed a slight gain, increasing from 8,235 metric tons in the 1927 half-year to 8,506 in the 1928 period. Approximately 32 per cent. of the imports of cotton cloth came from Alsace-Lorraine, more than 20 per cent. each from Great Britain and France, and slightly less than 10 per cent. each from Czecho-Slovakia and Switzerland. As previously stated, the influx of foreign piece goods during the first half of 1928 adversely affected the domestic weaving mills.

German exports of cotton fabrics are distributed to a wide range of countries, but the leading foreign markets during the first half of 1928 were Great Britain, Argentina, British South and West Africa, the Netherlands, Portuguese East and West Africa, China, the United States, Scandinavian countries, Austria, Rumania and Switzerland.

#### GERMAN EXPORTS OF COTTON KNIT GOODS.

Hosiery, underwear and gloves are the principal classes of cotton knit goods exported from Germany. Of the 915 metric tons of

gloves exported during the first half of 1928, 332 were sent to the United States, where such goods are popularly known as "fabric gloves." Great Britain ranked second with takings of 274 metric tons. The largest markets for the exports of hosiery, amounting to 2,238 metric tons in the 1928 half-year, were Italy, Great Britain, Austria, Sweden, the Netherlands, Denmark, Switzerland and the United States. The principal export outlets for the 1,750 metric tons of knitted underwear shipped abroad in the first six months of 1928 were Great Britain, the Netherlands, Sweden, Denmark, Norway, Austria, Netherland India, British India, Egypt, British West Africa, and Finland.

Despite the fact that exports have been fairly well maintained, the German knit-goods industry does not regard its position as very favourable. Although short-time operation has not been compulsory in the hosiery industry, as yet, restriction of working hours is considered probable unless the present reluctance to buy on the part of foreign customers is overcome. A fairly large number of fabric-glove factories have been forced to curtail operations.

#### GERMAN FOREIGN TRADE IN COTTON CLOTH SUMMARIZED.

German imports and exports of cotton cloth by classes and countries are given in the following table, compiled from official statistics:—

#### GERMAN IMPORT AND EXPORTS OF COTTON CLOTH DURING THE FIRST HALF OF 1928.

Country	Unbleached	Bleached	Printed	Piece dyed	Yarn dyed	Total
	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons	Metric tons
Alsace-Lorraine .. ..	2,606	378	238	88	47	3,357
Czecho-Slovakia .. ..	506	109	83	27	263	988
France .. ..	2,102	59	34	22	28	2,245
Great Britain .. ..	2,110	116	82	176	54	2,538
Switzerland .. ..	654	285	28	23	17	1,007
Other countries .. ..	80	33	82	10	61	296
	8,058	980	517	376	470	10,431
<b>Exports :</b>						
Argentina .. ..	367	17	19	18	75	496
Austria .. ..	45	56	24	27	44	196
British India .. ..	19		24	18	14	75
British East Africa ..	112					112
British South Africa ..	102		233	21	115	491
British West Africa ..	51		141	17	5	217
Chile .. ..	36	13	9	21	24	103
China .. ..	431					431
Denmark .. ..	85	67	33	45	139	369
Great Britain .. ..	472	104	50	42	321	989
Netherlands .. ..	41	102	110	44	119	416
Norway .. ..	46	26	29	32	79	212
Portuguese East Africa ..	39		182			221
Portuguese West Africa ..	213		237	8		458
Rumania .. ..		29		46	97	172
Sweden .. ..	41	47	23	33	33	177
Switzerland .. ..	16	51	40	30	55	192
United States .. ..	192	30	10	15	130	377
Other countries .. ..	615	317	753	375	712	2,772
Total .. ..	2,926	859	1,967	792	1,962	8,506

GERMAN FOREIGN TRADE IN COTTON MANUFACTURES  
SUMMARIZED.

The total volume of German import trade in cotton manufactures declined from 72,437 metric tons in the first six months of 1927 to 66,550 in the corresponding period of 1928, while the exports of similar commodities rose from 34,170 metric tons to 40,170. Details of the trade in cotton manufactures are shown in the following table:—

GERMAN FOREIGN TRADE IN COTTON MANUFACTURES

Item	Imports		Exports	
	1927	1928	1927	1928
	Metric tons	Metric tons	Metric tons	Metric tons
Cotton waste .. .. .	32,999	26,813	12,156	17,154
Yarn :				
Single, unbleached .. .. .	20,817	20,658	1,424	2,027
Single, bleached, dyed or printed .. .. .	131	322	955	1,085
Soft-twist ply yarns :				
Unbleached .. .. .	7,305	6,716	212	295
Bleached, dyed or printed .. .. .	65	132	375	470
Cable twist yarns .. .. .	380	323	102	96
Thread .. .. .	116	122	406	492
Total .. .. .	28,814	28,273	3,474	4,465
Piece goods :				
Unbleached .. .. .	7,787	8,058	3,564	2,926
Bleached .. .. .	815	980	830	859
Printed .. .. .	507	547	1,155	1,967
Piece dyed .. .. .	292	376	780	792
Yarn dyed .. .. .	415	470	1,906	1,962
Total .. .. .	9,846	10,431	8,235	8,506
Close-woven tissues for furniture and upholstery	28	35	461	606
Velvet, plush, and similar fabrics .. .. .	356	388	676	748
Open-woven tissues for draperies .. .. .	2	5	326	386
Tricot and netted goods .. .. .	6	7	217	371
Gloves and hair nets .. .. .	7	6	753	915
Hosiery .. .. .	29	91	2,684	2,238
Underclothing, knit .. .. .	23	33	1,798	1,756
Laces of all kinds .. .. .	6	44	103	304
Embroidery on cotton, wool, or linen base .. .. .	55	96	147	181
Fish nets .. .. .	80	209	179	249
Other cotton manufactures .. .. .	186	119	2,967	2,291
Total .. .. .	72,437	66,550	34,176	40,170

## BLEACHING IN CHINA.

Thirty years ago bleached cotton cloth consumed on the Nanking market was imported from abroad, but now four bleaching plants, each employing about 15 hands or more, are operating in the city. The plants are located at Fuchengtsang, in order to be near to the dyeworks, their chief customers, and also to drying facilities. Bleached cloth must be dried in the sun on a meadow. A plant requires several *mow* of land for drying cloth. Lime and soda are the bleaching agents. The cloth is first boiled in lime water and then washed clean in the city canal. The water at the Fuchengtsang section of the canal is particularly suitable for dyeing and washing bleached cloth, because it comes from the springs of the Purple Hill. After the cloth is washed clean of lime, it is soaked in soda water and steamed in a boiler for about 10 hours. The boiler is about three feet in diameter and divided into seven or eight sections with pieces of bamboo screen or matting from top to bottom. Each section contains some pieces of cloth. To make heating or steaming uniform, the positions of the cloths at different sections are reversed every two or three hours, that at the top being removed to the bottom and vice versa. After steaming, the cloth is washed clean and dried on a meadow before being sent to the dyework. If the latter find the work unsatisfactory, the cloth is returned to be bleached again. Each plant bleaches 500 or 600 pieces of cloth every day, at a charge of 30 cents per piece, 50 feet long. The total yearly output of the four plants approximates 500,000 pieces. The plants operate for 220-230 days every year, work being suspended on rainy days and in the coldest season, when cloth drying is impossible. Some big cloth dealers in Nanking have also established bleaching departments of their own. The appearance of the bleached cloth is further improved by calendering with heavy smooth stone blocks by the cloth calendering plants. (*The Chinese Economic Bulletin*.)

### *Bericht über die Lage des Textilhandels in Estland in die letzten drei Monate.*

Als Folge eines ganz abnorm feuchten Sommers, welcher die Landwirtschaft nicht günstig beeinflusst hat, hat der Einzel- auch Detail Handel in den letzten 3 Monaten schleppende Tendenz gezeigt, indem eine flotte Nachfrage nicht einsetzen wollte, besonders seitens des Hauptkonsumenten der Landbevölkerung.

Die Arbeitszeit betreffend, so spielte sich die Produktion bei den Textilfabriken Estlands ungefähr in denselben Grenzen ab, wie in der verflossenen Berichtsperiode.

Was die Beschäftigungsmöglichkeiten für die nächste Zukunft betrifft, so ist der Eingang von Orders eher ein schleppender gewesen; immerhin sind die Fabriken für ca. 2 Monate im Voraus mit Arbeit versehen.

In Lohnfrage-Angelegenheiten sind seit dem letzten Bericht keine Veränderungen eingetreten.

### OFFIZIELLE DATEN ÜBER DEN EXPORT ESTLANDS IN TEXTILWAREN.

Wir sind in der Lage die nachstehenden, bis hierzu vom offiziellen statistischen Zentralbüro verarbeiteten Daten zu geben: Es sind an Textilerzeugnissen exportiert worden im April in

Summa 373 tons, wobei als Hauptbestimmungslander Litauen mit 21 t., Lettland mit 60 t., Schweden mit 27 t., Deutschland mit 60 t., Finnland mit 13 t., Danemark mit 108 t., und Norwegen mit 45 t. in Frage kommen, was in Festl.-Kronen ausgerechnet im ganzen ca. 1,300,000 ausmacht.

Es sind an Textilerzeugnissen exportiert worden im **M a i** in Summa 420 tons, wobei als Hauptbestimmungslander Litauen mit 20 t., Lettland mit 40 t., Schweden mit 62 t., Deutschland mit 80 t., Finnland mit 16 t., Danemark mit 130 t. und Norwegen mit 40 t. in Frage kommen, was in Festl.-Kronen ausgerechnet im ganzen ca. 1,400,000 ausmacht.

Es sind an Textilerzeugnissen exportiert worden im **J u n i** in Summa 348 tons, wobei als Haupt Bestimmungsländer Litauen mit 16 t., Lettland mit 52 t., Schweden mit 31 t., Deutschland mit 69 t., Finnland mit 13 t., Danemark mit 78 t., und Norwegen mit 33 t. in Frage kommen, was in Festl.-Kronen ausgerechnet im ganzen ca. 1,300,000 ausmacht.

Es sind an Textilerzeugnissen exportiert worden im **J u l i** in Summa 360 tons, wobei als Haupt-Bestimmungsländer Lettland mit 87 t., Schweden mit 14 t., Deutschland mit 74 t., Finnland mit 14 t., Danemark mit 116 t., und Norwegen mit 30 t. in Frage kommen, was in Festl.-Kronen ausgerechnet im ganzen ca. 1,350,000 ausmacht.

Es sind an Textilerzeugnissen exportiert worden im **A u g u s t** in Summa 402 tons, wobei als Hauptbestimmungsländer Litauen mit 49 t., Lettland mit 77 t., Schweden mit 32 t., Deutschland mit 79 t., Finnland mit 15 t., Danemark mit 173 t. und Norwegen mit 14 t. in Frage kommen, was in Festl.-Kronen ausgerechnet im ganzen ca. 1,580,000 ausmacht.

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# MISCELLANEOUS

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## Rules for the Sale of Cotton Yarn in Italy.\*

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### I.—ESTABLISHMENT AND ACKNOWLEDGMENT OF THE RULES.

*Article 1.*—These rules for the sale of cotton yarn, compiled by special committees composed of spinners, spinners and weavers combined, and weavers, and published by the Associazione Cotoniera Italiana in the successive texts 1906, 1907, 1914 and 1922, have been confirmed after previous mature consideration by the present official text, dated 1928, of the Associazione Italiana Fascista degli Industriali Cotonieri.

The sales of yarn in Italy are to be governed by these rules, admitted to be in accordance with long commercial practice in this line of business.

### II.—CONTRACTS.

*Article 2.*—The conditions accepted by travellers or representatives will always be subject to the approval of the firm they represent, whilst they are binding for the purchaser.

Quotations are usually without guarantee.

Binding quotations must always state a definite date for the reply.

Quotations and orders to be made subject to the general conditions contained or referred to by the vendor in his contract forms.

*Article 3.*—The vendor may use forms in duplicate for drawing up the contracts, one of which shall be returned signed by the purchaser. In case of refusal or of non-return of the said duplicate signed by the purchaser, the vendor, if he does not intend to insist on the contract being respected, may consider the contract as cancelled by the purchaser owing to the latter's lack of action or neglect, and he may claim damages. This cancellation, however, is subject to a previous notice by registered letter to the purchaser requesting him to complete the written contract form within 10 days from the date of the said notice.

### III.—INSTRUCTIONS AS TO COUNTS.

*Article 4.*—For the execution of "basis" contracts the purchaser must give to the vendor within the time specified herein the necessary instructions about the counts and the make-up of the yarn to be made.

*Article 5.*—In the case of "basis" contracts the purchaser is at liberty to choose between the various counts mentioned in the contracts, subject, however, to the principle that an average of the

\* This well thought-out set of rules should prove useful to other countries in framing their rules; and, as Italy is now exporting large quantities of cotton yarn, it is well to be posted up as regards the rules governing yarn sales in Italy.

counts ordered for the various consignments must result, so as to avoid the contract having to be effected in its entirety in the highest and lowest counts only, unless this possibility is specially foreseen in the contract.

*Article 6.*—For the contracts for “prompt delivery,” “delivery as soon as ready,” “within the month,” and “delivery spread out over the month,” the assortment instructions must be given at the same time as the contract is stipulated. For the contracts for “delivery beyond the month,” the instructions must be given at least 30 days before the date specified for the delivery. When the yarns to be supplied are of counts 60 or above, or of a special make-up or lea, or if they are to be bleached or colored yarns, the instructions must be given at least 60 days before the date of delivery.

*Article 7.*—If the purchaser does not give the instruction within the time according to usage, or as stipulated in the contract, the vendor will have the right to prolong the date of delivery by a period according to the delay which has taken place in giving the instructions, provided of course that the vendor himself has not requested the immediate execution by giving a special notice as provided for hereunder. If no instructions are given within the proper time for the immediate execution of the work for each delivery as contracted, the vendor may give special notice by registered letter, or by wire, to the purchaser, granting him an additional peremptory period of 10 days for the delivery of the said instructions. If no instructions are given even after this special period has elapsed, he (the vendor) will have the right to put in hand and send one or more counts of yarn at his option on the basis of the contract, giving notice to the purchaser by registered letter, or he may cancel that part of the contract which has not been disposed of, and may demand damages from the purchaser.

#### IV.—DELIVERIES AND FORWARDING.

*Article 8.*—Contracts, unless otherwise expressly stipulated, will be deemed to have been delivered if the following rules have been complied with. The word “delivery” will always and only mean “the placing of the goods at the disposal of the purchaser at the works,” quite independently of the possibility or impossibility of despatch. The sending to the purchaser of the invoice and of a list identifying the goods shall be deemed to be proof of delivery. The vendor may also be entrusted with the despatch. By “despatch” is meant the sending of the goods from the mill in accordance with the instructions of the purchaser, who is under obligation to give such instructions immediately. The date of the despatch must in the ordinary course coincide with the date of the invoice, a margin up to five days being, however, admitted.

If for reasons independent of the will of the vendor, the despatch should have to be delayed beyond the five days of margin, the purchaser shall have the right to obtain, by request, a postponement of the date of payment equal in length to the number of days by which the despatch has been delayed beyond the above-mentioned margin. During the time between the “delivery” and the actual despatch of the goods from the mill, the vendor is responsible, as trustee, for the preservation of the goods. The vendor is, how-

ever, not responsible for the destruction, or for eventual damages to the goods in deposit, caused by *force majeure*; the expression *force majeure* includes also cases of occupation (by military, etc.), pillaging, "deceitful fires," usually not covered by the insurance policies. The responsibility of the vendor cannot, however, in any case, exceed the invoice value of the goods. When the goods are left on the hands of the vendor for lack of forwarding instructions, or by request of the purchaser, the vendor, who is willing to take charge of the goods, has the right, by giving notice to the purchaser, to charge for warehousing and insurance at the rate of  $\frac{1}{2}$  per cent. per month on the invoice value, adding this charge as "advanced expenses."

*Article 9.* (*a*) By "prompt delivery" is meant delivery in one or more lots within 15 days from the confirmation of the contract by the purchaser.

(*b*) By "delivery as soon as ready" is meant delivery in one or more lots within a time not exceeding 8 weeks from the date of the confirmation of the contract by the purchaser.

(*c*) By "delivery or deliveries within the month" is meant delivery in one or more lots within the month in which the contract was confirmed by the purchaser.

(*d*) By "deliveries spread out over a month" is meant a proportional and approximate delivery spread out over the various weeks remaining at the end of the month in which the above-mentioned confirmation was received.

(*e*) By "delivery or deliveries within . . ." is meant the delivery within the time specified in one or more consignments at the option of the vendor.

(*f*) By "delivery or deliveries spread over . . ." is meant the proportional and approximate delivery spread over the various months comprised in the contract period beginning from the month following that in which the contract was confirmed, without distinction of weeks or days.

(*g*) By "delivery or deliveries at call within . . ." is meant the delivery at call of the purchaser within the time specified in the contract, taking into consideration the period for giving instructions.

In this case, however, the vendor cannot be compelled to deliver the whole of the goods ordered within a time shorter than half the time provided for the execution of the whole contract. If the date of delivery is not specified in the contract it will be deemed to be seven whole months from the date of the contract.

*Article 10.*—Except in the case of "prompt delivery" or "delivery as soon as possible" (see (*a*) and (*b*) in Article 9), the vendor shall have the benefit of a margin of 15 days after the date of each single delivery.

Subject to the limits of margin of the weight of the total contracted quantity, settled by Article 18 hereunder, in so far as the quantities of each delivery are concerned, the following variations, more or less, are admitted, as compared with the instructions:—

(*a*) For grey yarns in general; up to 5 per cent.

- (b) For grey yarns of counts 60 and above; up to 10 per cent.
- (c) For yarns of special make-up or special lea, bleached or coloured; up to 10 per cent. for each make-up or each colour.

*Article 11.*—When the vendor has not effected delivery, be it in part or wholly, within the dates specified, and after the lapse of the marginal period provided for in Article 10, the purchaser, if he has given his instructions in good time, and if he has effected payments properly, will have the right to cancel that part of the contract which concerns the goods not delivered in time, and may claim damages.

To take advantage of these rights the purchaser must, however, give special notice to the vendor by registered letter or by wire, fixing a peremptory period of at least 10 days within which to effect the delivery in question, if the yarns to be delivered are grey yarns of ordinary make-up, and a period of at least 15 days when the yarns to be delivered are of counts 60 or higher, or if they require special make-up, special work, special lea, or if they are bleached or coloured.

The cancellation of part of the contract due to delay of one or more deliveries does not entail the right of cancellation of the whole contract, nor is it in itself a sufficient reason for non acceptance of future deliveries.

*Article 12.*—When non-delivery has been caused by *force majeure*, which has prevented or largely reduced the production of the vendor's works, or of those of the purchaser, the contract shall not be cancelled, but simply prolonged.

The following will be considered as cases of *force majeure*:

Fires, tremors, floods, damage to the driving motors or to the main transmissions, interruptions in the supply of power, extraordinary drying-up of rivers or canals, non-receipt of supplies due to breakdown of the port or railway services, and any other unforeseen and irresistible cases, hindering or largely reducing the production.

The prolongation conceded in the case of *force majeure* usually amounts to 45 days for all deliveries. In cases of heavy damage by fire, or by any other cause, interrupting the production for more than 45 days the prolongation may be extended to 90 days.

The vendor who has suffered by *force majeure* also has the right to deliver, and the purchaser has the duty to receive goods corresponding to those contracted for, even though they may have been made by a different firm.

If the effects of *force majeure* should last more than the time provided above, the vendor, if he has not taken advantage of the right to deliver corresponding goods, must compensate the purchaser for any difference in price for the goods not delivered, but cannot be called upon to pay any other damages.

Vice versa, if the purchaser should be unable to resume the production interrupted by *force majeure* within the time of the prolongation of 45 or 90 days as above, then he must compensate the vendor for any difference in price for the goods not taken, but shall not be liable to stand for any other damage.

## V.—FORWARDING.

*Article 13.*—Usually the consignments are sent as ordinary freight to the stipulated port by the route the vendor considers the best, collecting as advanced expenses any eventual charges for warehousing and insurance, as per Article 8.

Should any difficulties arise in forwarding the goods by the ordinary means the vendor may make use of the services of forwarding agents without the purchaser having the right to render him responsible for any increased expenses.

The moment the goods have left the mill they travel for account and risk of the purchaser, even when the goods are sent carriage paid. Should the vendor agree, by request of the purchaser, to insure the goods during transport, then the orders to that effect must be given in good time, and they will be carried out at the expense and risk of the purchaser.

## VI.—TUBES TARE.

*Article 14.*—The light tubes and the small bobbin tubes on which the yarn is wound are included in the weight of the goods to be invoiced within the limits specified herein, and are not returnable to the vendor.

The heavy ring tubes or cops, and the very heavy fluted tubes for ring bobbins, are returnable to the vendor, their weight being established by the methods and limits given herein.

*Article 15.*—The weight of the tubes (tare) will be charged in the invoice and debited to the purchaser at the price of the yarn within the following limits:—

For weft bobbins for shuttles: 3 per cent. of the total gross weight.

For the same bobbins with special tube, destined for further treatment in bleaching or dyeworks: also 3 per cent. of the gross weight, if the real tare does not reach 6 per cent.; and 4 per cent. of the gross weight when the real tare is 6 per cent. or above.

For the ring bobbins on very heavy fluted tubes: 3 per cent. of the net weight.

For the cylindrical bobbins: 2 per cent. of the gross weight.

For the mule cops: 2 per cent. of the gross weight.

For the ring cops on light tubes: 2 per cent. of the gross weight.

Any excess of tare over these percentages must be deducted on the invoice or credited to the purchaser at the price of the yarn.

The percentages of tare included in the weight to be invoiced are an integral part of the quantity of yarn fixed in the contract.

Any claims about the tare of the tubes must be made within 30 days from receipt of the goods.

*Article 16.*—For the heavy ring tubes or cops to be returned the real tare is calculated by one of the following methods:—

(a) The spinner reckons out the tare represented by the tubes, deducts it from the gross weight, and invoices the net weight of the yarn. Any difference between the calculated tare and the real tare will be reciprocally compensated in full at the price of the yarn,

provided that it exceeds 3 per cent. of the tare deducted on the invoice. Up to 3 per cent. no compensation to be paid.

(b) From the gross weight the spinner deducts an approximate percentage for the tare represented by the tube, and invoices the approximate net weight. When the tubes are returned the difference between the approximate weight of the tubes deducted on the invoice and the real weight will be balanced. Any difference will be reciprocally compensated in full at the price of the yarn, provided that it does not exceed 3 per cent. of the approximate tare. Any difference up to 3 per cent. will not be compensated.

(c) The spinner invoices the yarn, taking the gross weight (including the tubes) and gives credit for the tubes at the price of the yarn when the tubes are returned.

*Article 17.*—The returnable tubes must be returned in good condition within three months from date of delivery. The compensations provided for in Article 16 will be payable on the same date as the invoice, provided that the tubes have been returned within the above-mentioned period of three months. The compensation for returns made after the said three months will be due on the date of the return, provided, of course, that the invoice has become due in the meantime.

#### VII.—MARGINS OF QUANTITY, WEIGHT, HUMIDITY, RESISTANCE, ETC.

*Article 18.*—Unless otherwise stipulated in the contract, the following margins up or down will be tolerated in favour of the vendor between the contracted quantities and those actually delivered; in the case of contracts for single yarns and grey twist:

5 per cent. for contracts up to 1,000 kg.

3 per cent. for contracts over 1,000 kg. and up to 5,000 kg.

2 per cent. for contracts over 5,000 kg., but for which the margin must not exceed a total of 500 kg.

For yarns in cops or on bobbins the minimum margin is one case or one bag.

For yarns of counts 60 and above, or of special make up or lea, or bleached or dyed, the margins of latitude up or down are the following:-

10 per cent. for contracts up to 2,500 kg.

5 per cent. for contracts above 2,500 kg., provided that the total excess up or down does not exceed 1,000 kg.

In case of continued deliveries referring to several contracts for the same quality and make-up, the latitude will be reckoned as per above-mentioned rules, applied to the quantity of the last contract only.

*Article 19.*—In the case of consignments of yarns of any quality and make-up a margin up to 1 per cent. of the invoiced net weight will be permitted for differences that may be caused by atmospheric conditions. By net weight is meant the weight resulting after deducting the packing only.

When the difference in the weight, due to the above-mentioned causes, exceeds 1 per cent., then compensation is paid for the excess above the 1 per cent.

*Article 20.*—In cases of sales in “packs” or in “bundles,” it is understood that the pack or bundle must contain yarn weighing 4,500 kg. net. Any shortage of this weight will have to be made good on the total consignment with the right of balancing between pack and pack, always subject to a latitude of 1 per cent., as stipulated in Article 16. In packs or bundles of yarns bleached, dyed or mercerized in the hank the shortage or surplus of weight caused by the operations of bleaching, dyeing or mercerizing go for the account and risk of the purchaser.

*Article 21.*—Cotton yarn entirely dried by conditioning at a temperature of 105–110° Centigrade, and in accordance with the practice of the Royal Experimental Office for the Paper Industry, and for the study of textile fabrics in Milan, must not show a decrease higher than 7.834 per cent., corresponding to the “regain” of 8.50 per cent. of the absolute dry yarn.

$$(108.50 : 8.50 - 100 : 7.834.)$$

In case of dispute the parties will jointly draw the samples necessary for fixing the percentages of the degrees as follows:—

At least 250 grammes per case of bobbins or cops.

„ „ 250 grammes for every parcel containing up to 30 packs.

„ „ 500 grammes for every parcel containing more than 30 packs.

The samples must be of such a nature as to show a proper proportion between the various parcels and the cases, where different hygroscopic conditions may be existing.

As regards the method of gauging, reference is to be made to the regulations for analysis issued by the Royal Experimental Office for the Paper Industry and for the Study of Vegetable Fibres in Milan.

The averages of the percentages of decrease resulting from the tests of conditioning of each single reference sample must not exceed the above-mentioned measure of 7.834 per cent. If the decrease exceeds this average the excess must be compensated to the buyer.

*Article 22.*—There are no official tables concerning the twist, the resistance, and the elasticity of the various counts of yarn. These features vary according to the quality of the cotton and the method of working.

The average margin of tolerance permitted on the standard number of doubling turns is 5 per cent.

#### VIII. COUNTS OF THE TEST SAMPLES.

*Article 23.*—The numbering usually adopted for identifying the various counts of yarn is the English numbering, unless the parties to the contract have agreed to use a different numbering method.

In the English numbering the count indicates the number of small hanks of 840 yards each contained in one English pound weight, in its normal condition of humidity.

*Article 24.*—The count is fixed by means of test samples.

By “test sample” is meant a small hank of 840 yards, composed of seven leas of 120 yards each, unwound from as many bobbins, cops or hanks.

For the purpose of determining the count of the yarn contained in a case the test sample must be composed of seven leas, unwound from as many cops or bobbins taken out of seven different layers in the case. The count of the test sample will be the count of the yarn in the case.

For the purpose of fixing the count of the yarn in a parcel containing not more than 30 packs, the test sample must be composed of seven leas unwound from as many hanks taken from seven different packs. The count of the test sample is that of the contents of the whole parcel.

If the parcel contains more than 30 packs, then two test samples must be taken. In such a case the count of the yarn in the parcel is fixed by the arithmetical average of the two test samples.

By average count of a quantity or consignment is meant the arithmetical average of the single test samples.

*Article 25.*—In the case of test samples of 840 yards the following differences up or down will be tolerated, as compared with the invoiced count :—

7 per cent. up to and including count 14.

6 per cent. from count 14, and fractions up to count 24 included.

5 per cent. from count 24, and fractions up to count 50 included.

4 per cent. from count 50 and upwards.

Test samples exceeding this margin are not in compliance with the average count of the whole lot under examination.

The following margins are allowed on the average count of the whole lot together :—

3½ per cent. up to count 14 included.

3 per cent. from count 15 to 24 included.

2½ per cent. from count 25 to 50 included.

2 per cent. from count 51 and over.

In the case of yarn made from waste by the condenser system the margin for each test sample is 12 per cent., and for the average count of the whole quantity 6 per cent.

*Article 26.*—In case of dispute on the count of the yarn the parties will jointly draw samples as indicated in Article 21, and, as regards the methods of testing, reference will be made to the rules of the Royal Experimental Office.

In fixing the average count of a lot the hygrometric condition of the relative test samples must be taken into consideration by multiplying the weight of the test samples in the absolute dry condition by the figure 1.085, so as to find the exact weight, and thereby the count in the standard condition of humidity (7.834 per cent.).

The vendor must substitute the cases or parcels, the test samples of which show a count exceeding the margin specified in the first section of Article 25, and which therefore cannot form the average count of the lot. Delivery must be made within 15 days from the date of the communication by registered letter, giving the result of the tests.

If the average count of the lot is found to be finer than the count contracted for, then the purchaser shall have no right to

compensation; neither shall the purchaser have any right to compensation if the average count is inferior to the count contracted for, but still within the limits of margin specified in the second part of Article 25.

If these limits are exceeded the purchaser shall have the right to demand compensation in the proportion of the heavier weight of yarn necessary for the manufacture, after deducting the respective margin. The compensation may be paid either in form of money or of yarn.

The vendor may, however, substitute the goods, and in that case he must deliver half of the quantity, rightly objected to, within not more than 15 days from receipt of the communication of the test results, and the balance within one month. If the count of the yarn is 60 or above, or if the yarn is of a special make-up or special lea, or if it is special twist, the above periods are doubled.

All expenses for carriage to and fro for the cases or parcels to be substituted are to be paid by the vendor.

*Article 27.*—Doubled yarns are defined by the count of the single yarn and the number of threads composing same. In fixing the count the shortening due to doubling must be taken into account.

In fixing the count of the yarn (single or doubled), bleached, dyed or mercerized after spinning, the normal variation of the weight and of the length due to the operations of bleaching, dyeing and mercerizing must be taken into account.

#### IX.—PACKING.

*Article 28.*—As a rule, unless specially arranged otherwise, the packing material of light cases, bags or parcels, is invoiced by the vendor to the purchaser at cost price.

Heavy cases and special bags must be returned by the purchaser in good condition, subject, of course, to the normal wear and tear, carriage paid, within three months. After this period the vendor shall be entitled to demand payment from the purchaser at the cost price.

#### X.—PAYMENTS.

*Article 29.*—As a rule, payments must be made direct to the domicile of the vendor. Payments made to travellers, representatives, etc., when the latter are not expressly authorized by the vendor, are made on the responsibility of the purchaser.

*Article 30.*—The "sale note" contracts for cotton yarn generally include the clause "conditions of the Cotton Institute," which gives them the nature of a contract subject to the rules of this Institute as regards the terms and the methods of payment, the discount and the sanctions in cases of delay, etc., etc.

If the contracts do not include this clause, and if the conditions of payment are not stipulated differently, then the rules set down in Article 31 apply.

*Article 31.*—In cases of delayed payments, the delay interest is to be paid at the current rate; but, in any case, at a rate not less than 6 per cent. per annum.

The debtor who does not pay within five days from the date when payment is due, in addition to having to pay delay interest, loses the right to discount.

Any bills or acceptances the creditor may accept in payment will be calculated at the net value after deducting the discount at a rate of 1 per cent. higher than the official rate of the Banca d' Italia, and all collection expenses that may have to be incurred.

When the contracts do not specify the conditions of payment, it shall be understood that payment must be made in cash 30 days from date of invoice, with  $3\frac{1}{2}$  per cent. discount.

*Article 32.*—If the purchaser has not effected payment 10 days after the due date of payment of the invoice, the vendor shall have the right to suspend all consignments, including those which ought already to have been completed. He is also entitled to cancel not only the contract in regard to which payment has been delayed, but also the other contracts that may have been concluded, or which are still awaiting execution. The vendor also has the right to demand compensation for damages from the purchaser, if the latter has not provided cover for the amount due, 20 days after the date of a registered letter sent by the vendor to the buyer.

*Article 33.*—In the yarn trade it is a rule that disputes do not suspend payments. The debtor may, however, make a deposit, subject to limiting conditions, of the amounts due, relative to goods or disputed invoices, with a bank on his responsibility, and such deposit is considered prejudicial to the taking into consideration of claims.

## XI.—CLAIMS.

*Article 34.*—All claims must be made by registered letter.

Claims respecting the weight must be made within five days; those relating to the quality, and in general to visible faults, must be made within 15 days. These periods begin from the date of arrival of the goods.

Complaints due to "hidden defects" must be made within three days from discovery of such defects, but not more than three months after arrival of the goods.

The vendor must do his utmost in the dispute to facilitate the joint taking of samples, or the production of other material that may be asked for by the purchaser to ascertain the quality, the conditions, and the state of the goods under dispute.

If within 10 days from receipt of a letter of warning from the purchaser, under registered cover, or of a wire, the vendor should still refuse to allow samples to be taken, thus making it impossible to arrange the matter quickly and extrajudicially, then he loses the right, provided for in Article 36, of substituting the goods that may be found irregular.

The purchaser in his turn must also do his utmost to provide the technical proofs the vendor may request, subject to the above-mentioned terms and methods. If the purchaser should not comply with these regulations then his claim will become void. It is customary in the yarn trade, before taking any steps of a contentious nature, for the purchaser to request the vendor to supply all technical proofs, taking as a guide for the tests the rules of the Royal Experimental Office.

*Article 35.*—The vendor is not responsible for faults or for the condition of yarns which have undergone further treatment.

*Article 36.*—If a claim is proved to be justified the vendor still has the right to substitute the unsatisfactory goods, delivering half of same within the maximum period of 15 days from the finding, or from the date of the communication made to him by registered letter of the result of the examination, and the other half within 30 days.

For doubled yarns and for yarns of special make-up, special lea, single yarns of counts 60 and above, bleached, dyed or mercerized yarns the above terms are doubled.

All expenses for transport to and fro of the cases or parcels to be substituted are to be paid for by the vendor.

If the further deliveries intended to substitute the faulty goods still give rise to justified complaints of the same nature the purchaser shall have the right to cancel the contract in so far as the contested goods are concerned, and to demand damages.

In fixing the eventual indemnity to be paid to the purchaser for the cancellation of the contract, as a consequence of a legitimate claim, or for any other juridical cause, the benefit or damage caused to the purchaser by the cancellation due to differences of market value of the yarn at the time of the cancellation, must be taken into account.

*Article 37.*—Any eventual amends agreed to by one of the contracting parties for non-observance of the conditions of the contract, or of the custom of sale on the part of the other contracting party, may in no case be considered as a derogation of the conditions and customs having contractual value.

## XII.—ARBITRATION AND JUDGMENTS.

*Article 38.*—As a rule, disputes relating to purchase and sales of yarn are settled by arbitration in an amicable manner.

The constitution and working of these arbitrations are subject to the regulations of the Associazione Italiana Fascista degli Industriali Cotonieri.

Unless it is provided otherwise in the contracts either to exclude or to provide arbitration in every case, it will be assumed that the parties will have agreed to submit to amicable arbitration, subject to the regulations of the said Associazione, all disputes relating to the interpretation, the execution and cancellation of contracts, instructions, deliveries and consignments, tubes (tare), margins, tests, packing, and any other question of a technical nature.

It is also a rule that any judicial disputes relating to purchases and sales of yarns will be submitted to the Courts of the vendor, and it is assumed that the parties have agreed hereto, unless stipulated expressly otherwise, and in particular when the contract contains reference to these rules of sales.

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Milan, *2nd May*, 1928, Year VI.

THE EXTRAORDINARY COMMISSARY OF THE ASSOCIAZIONE ITALIANA  
FASCISTA DEGLI INDUSTRIALI COTONIERI:

After having seen the reports of the meetings held on the 27th January, 8th February, 1st March, and 25th April, 1928, by the Committee for the Revision of the Rules of Sale of Cotton Yarn,

consisting of the following persons: Cav. del Lav. Aristide Basilico, Ing. Francesco Cesoni, Gr. Uff, Biagio Gabardi, Gr. Uff, Vittorio Olcese, Cav. Gino Pozzi, Avv. Roberto Pozzi, Consulting Counsel, Prof. Giuseppe Riva, Secretary:—

After having seen the deliberation of the 25th April, 1928, whereby the above-mentioned Committee approved of the integral text of the above-mentioned rules:—

After having seen Articles 4, letter (e) and 27 of the statutes of the Association:

Making use of the powers conferred upon him:

Approves of and declares official the "text 1928 of the rules for the sale of cotton yarn" attached to the above-mentioned deliberation of the 25th April, 1928.

G. OLIVETTI.

## GERMANY

# Rules for the Trade Description of Wool, Cotton, Linen and Mixtures. Examination of Artificial Silk.

The German retail textile organizations have established, together with representatives of consumers and scientific bodies, the following definitions:—

## DEFINITIONS FOR COTTON. NO. 301A.

- (1). Cotton is the hair from the seed of the cotton plant.
- (2). The name "cotton," or similar foreign definition or any word coined containing such an expression, may only be used for textile goods which are manufactured from pure cotton.
- (3). Definitions which do not contain the word "cotton" or some other equal name in a foreign language, which, however, show
  - (a) The origin of the raw material from a definite country of origin, or
  - (b) Which are in common usage only for goods made solely of cotton (for instance "cretonne")

may only be used for goods which are manufactured entirely out of pure cotton.

The term "maco," or some change of this word, can only be used for cotton goods which have been made entirely from Egyptian cotton.

## DEFINITIONS FOR LINEN. NO. 330A.

- (1). Linen is the product of the fibre below the outer covering of the stem of the flax plant (bast).
- (2). The name "linen," or some equivalent German or foreign description or some compound word including such words, may

only be used for textile goods which have been manufactured from pure linen yarn (flax or tow), except that the definition by itself bears unmistakably the character of the material, such as half-linen.

Descriptions containing the word "linen," or some German or foreign name of equal meaning and which are at the present time taken to mean goods wholly or partly made from linen yarns or are meant for goods made entirely from another raw material, must only be used for goods manufactured entirely from linen yarns (see also remarks under 392*a* for textile mixings containing cotton or linen).

#### DEFINITIONS FOR TEXTILE MIXINGS CONTAINING COTTON OR LINEN. NO 392A.

(1). Under textile mixings are understood all such goods which contain either:

- (a) Mixed yarns of different raw materials.
- (b) In warp or weft yarns made from different raw materials,  
or
- (c) Goods which are plaited.

(2). Goods described as "half-linen" must contain linen to the extent of at least 30 per cent. of the total weight, or either warp or weft must consist of linen.

(3). Linen or cotton goods which contain

- (a) So-called fancy threads made of silk, artificial silk, mercerized cotton, etc., or
- (b) Which have the name or mark of the consumer or borders woven in, such names consisting of a raw material different from the basic cloth

are not to be considered as textile mixings but as pure goods in accordance with the Definitions 330*a* for linen and 301*a* for cotton.

To the definitions for textile mixings must be added that they are not applicable to so-called carpet or furniture materials, as these do not come under the meaning of textile mixings. For this reason these, and similar textile materials, are exempt from the definitions of the German Association of Textile Retailers.

In conjunction with the definitions of linen the Association of German Linen Industrialists has designed a trade mark "Rein-leinen" (pure linen) which may be used by members for all such textile goods which come within the official definition of linen.

#### EXAMINATION OF ARTIFICIAL SILK.

For some time the makers of artificial silk have expressed a wish to establish uniform principles for the examination in the laboratories of the mills. The Executive Committee (R.A.L.) drew up conditions and convened a meeting for the general consideration of this matter by the various producers of artificial silk. A proposal emanating from the industry itself was sent to all delegates, and at the meeting of September 20, 1927, in Berlin, the subject was discussed. It was then found that it was not yet possible to arrive at final decisions, as differences of opinion existed on various points, but in the interest of furthering the matter it was considered

desirable to publish a preliminary statement, and the work of continuing experiments was handed over to a special commission. This commission is to submit, after the lapse of one year, final proposals. All who are engaged in the examination of artificial silk are requested to communicate their experiences and desires to the *Reichsausschuss für Lieferbedingungen, Berlin, N.W.6.*

We publish the official text of the preliminary statement which was signed by the various organizations interested in the production and finishing of artificial silk.

#### (1). DEFINITION AND MEANS OF DISTINGUISHING ARTIFICIAL SILK FROM PURE SILK.

Artificial silk is a yarn, similar to natural silk, which has been produced by chemical means from cellular materials such as cotton or other suitable raw materials.

Silk (natural silk) is a fine fibre which has been forced by the silk worm (*bombix mori*) out of the head glands in the preparation of the chrysalis for the making of the cocoon, which then becomes hardened.

The raw silk yarn consists of two fine interior single threads (without colour). This is the real silk whose chemical name is fibroin. These fine threads are enveloped by the yellow or colourless silk glue called at times silk husk (sericin). When raw silk is boiled with soap (decorticated) the sericin dissolves and fibroin remains as pure silk.

#### (2) METHODS OF EXAMINATION TO DISTINGUISH ARTIFICIAL SILK FROM PURE SILK.

i. *Burning Test.* The vapours arising in the burning\* of artificial silk are sour, whilst silk gives off vapours that smell like burnt horn, the latter act like alkalies. Silk which has been weighted with metal salts burns in such a way that the skeleton of the fibre remains.

ii. *Solution Test.* In boiling with 40 per cent. sodium solution artificial silk remains without dissolving, but real silk dissolves quickly.

#### (3). DEFINITION OF ARTIFICIAL SILK VARIETIES.

(a) Acetate silk.

(b) Nitro silk.

(c) Copper silk.

(d) Viscose silk.

i. *Burning Test.* The fibres are twisted together and taken slowly near a small flame. If the thread melts and hardens to a brittle glass-like matter, one has to deal with acetate silk, which in burning throws off a strong sour smell.

Nitro, copper and viscose silk give off a similar smell to pure paper and leave behind very little ash.

ii. *Solution Test.*

(a) Acetate silk is distinguished from other artificial silks, in that it is soluble in pure acetone; soaped and dyed acetate silk will leave behind a thin skin.

- (b) Nitro silk. The thread is moistened with a colourless solution of 1 per cent. diphenylamine in pure concentrated sulphuric acid. Nitro silk takes on at once a deep blue colour; and the fibres soon dissolve to a blue solution.

The other artificial silks do not take on blue and dissolve much more slowly.

iii. *Burning Test.* Copper drawn-out silk and viscose silk. 15 c. cm. of Pelikan ink, No. 4001 of Günther Wagner, 20 c. cm. of a solution of 0.5 per cent. of eosin extra (I. G. Farbenindustrie) and 65 c. cm. of water are mixed together, and in this solution the samples are kept for five minutes, moving them to and fro, at the ordinary temperature of a room. (For larger quantities more dye has to be used.) The samples are then washed thoroughly and dried in the air or in a temperature of 60° C.

Copper silk appears then deep blue, whilst viscose silk becomes red.

#### (4). TITRE DEFINITION (COUNTS).

The titre is a measurement of the fineness of the thread which in other yarns is defined by the number or count.

The basis of the titre is the denier (den.). The titre indicates the quantity of grammes which 9,000 metres weigh; for instance, artificial silk 160 den. is an artificial silk of which 9,000 metres weigh 160 grammes.

For the purpose of defining the titre of whole lots—at least 10 samples (two of each)—therefore altogether 20 tests are made; the average titre is calculated from these. 450 metres are reeled off and weighed for every test.

The samples are dried in a temperature of 105 to 110° C. so long until they lose within 10 minutes less than 0.05 per cent. of the weight. From the dry weight thus obtained of 450 metres = a, and the humidity addition to the dry weight called b per cent., the humidity that has to be added is calculated according to the formula  $\frac{a \times b}{100}$ . The titre is then  $20a \left( \frac{1 + b}{100} \right)$  den. The titre applies to the thread with a humidity regain of 11 per cent. to the weight of the absolutely dry thread (in the case of acetate silk 6 to 8 per cent.).

*Example:* If we take the dry weight of  $20 \times 50$  m. (= 20a) to be, say, equal to 108 grammes (the humidity regain in percentages is 11 per cent.), the titre is therefore  $= 108 \left( \frac{1 + 11}{100} \right) = 119.88$  den.

#### (5). DEFINITION OF TURNS.

Under turns is to be understood the number of turnings of a thread around itself in the unit of a given length (i.e., one metre). The turns are calculated on a length of 50 cm., this length of yarn being held between two clips. The thread is kept at a certain tension through the addition of a small weight. The size of the weight in grammes is to be  $\frac{\text{titre}}{30}$ . Of at least five samples each, two tests are made, altogether at least 10, from which the average number of turns for a length of one metre are taken

*Example:* 60 turns of 50 cm. length between clips show  $60 \times 2 = 120$  turns for one metre length of thread.

(6). EXAMINATION AS TO RESISTANCE AND BREAKING STRAIN.

From different hanks at least 20 tests are made, from which the average breaking strain and elasticity are calculated. All values of breaking strains are converted to 100 den. in the certificates, and the actual figures are also given in order to enable comparisons.

The samples are to be taken at least 24 hours before the test is being made, in a room with 60 per cent. relative humidity, and the tests have to be made under the same conditions.

The dry samples must be taken hold of only by the ends in order to avoid the transference of the moisture of the hand to the yarn that is to be broken. The thread has not to be touched by the hand before fixing into the clips, but it must be kept tight through a weight of  $\frac{\text{titre}}{30}$  grammes.

For the purpose of making tests with wet samples the thread is placed for half an hour in a solution of 100 c. cm. of glycerine, sufficient quantity of a suitable moistening medium and 375 c. cm. distilled water. Then the sample is taken out and at once torn asunder.

The length for fixing between the clips is 50 cm.

The velocity of the movable clip is to be 50 cm. per minute when the apparatus runs empty.

*Note.*—In order to have a clear judgment it is necessary to know particulars of the twist and turns. These should be given in the certificate.

It is necessary to know the turns as well as the twist (doubling).

Under twist (doubling) is meant the twisting together of one or more twisted or single threads.

## Rayon and Allied Products.

*Source: Census of Manufactures, 1927.* Washington, D.C., August 22, 1928.—The Department of Commerce announces that, according to data collected at the biennial census of manufactures taken in 1928, the establishments engaged primarily in the production of rayon and allied products in 1927 reported, for that year, a total output valued at \$109,888,336, an increase of 24.8 per cent. as compared with \$88,060,962 for 1925, the last preceding census year. The production in 1927 was made up as follows: Yarns, 75,555,439 lbs., valued at \$106,468,752; allied products (sheets, etc.), 2,053,204 lbs., valued at \$3,076,835; and waste, 2,985,390 lbs., valued at \$342,749.

This industry classification embraces establishments engaged primarily in the production of rayon yarns and of allied products in the form of sheets, etc., but does not cover establishments manufacturing rayon yarns into finished products, such as textiles.

Of the 19 establishments reporting for 1927, three each were located in New Jersey and New York, two each in Ohio, Pennsylvania, Tennessee, and Virginia, and one each in Connecticut, Delaware, Maryland, New Hampshire, and West Virginia.

The statistics for 1927 and 1925 are summarized in the following statement. The figures for 1927 are preliminary and subject to such correction as may be found necessary after further examination of the returns.

	1927	1925	Per cent. of increase.
Number of establishments ... ..	19	14	( <sup>1</sup> )
Wage earners (average number) ( <sup>2</sup> )	26,341	19,128	37.7
Wages ( <sup>3</sup> ) ... ..	\$28,649,441	\$22,975,605	24.7
Cost of materials, factory supplies, containers for products, fuel, and purchased power ( <sup>3</sup> ) ... ..	\$25,747,792	\$18,477,965	39.3
Materials, supplies and containers ... ..	\$22,743,855	( <sup>4</sup> )	—
Fuel and power ... ..	\$3,003,937	( <sup>4</sup> )	—
Products:—			
Total value ( <sup>3</sup> ) ... ..	\$109,888,336	\$88,060,962	24.8
Rayon:—			
Yarns:			
Pounds ... ..	75,555,439		
Value ... ..	\$106,468,752		
Waste:			
Pounds ... ..	2,985,390	51,902,491	55.3
Value ... ..	\$342,749	\$88,007,873	24.9
Allied products (sheets, etc.):—			
Pounds ... ..	2,053,204		
Value ... ..	\$3,076,835		
Other products ... ..	—	53,089	—
Production, by process:—			
Total, pounds ... ..	80,594,033		
Viscose ... ..	70,560,808		
Other — Nitrocellulose, acetate and cuprammonium	10,033,225		
Value added by manufacture ( <sup>5</sup> )...	\$84,140,544	\$69,582,997	20.9
Horse-power ... ..	122,406	66,966	82.8

<sup>1</sup> Per cent. not computed where base is less than 100.

<sup>2</sup> Not including salaried employees.

<sup>3</sup> The amount of manufacturers' profits cannot be calculated from the census figures, for the reason that no data are collected in regard to a number of items of expense, such as interest on investment, rent, depreciation, taxes, insurance, and advertising.

<sup>4</sup> Not reported separately.

<sup>5</sup> Value of products, less cost of materials, factory supplies, containers for products, fuel and purchased power.



Codes Used—ABC, Western Union, Bentley's and Lieber's.

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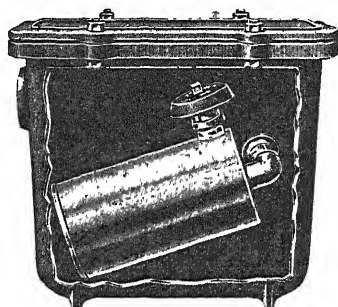
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# Calculated TOTAL WORLD'S COTTON MILL STOCKS comparison on basis of Spinners' returns

COUNTRIES		IN THOUSANDS OF ACTUAL BALES (regardless of weight)							
		AMERICAN				EAST INDIAN			
		Half-year ending				Half-year ending			
		July 31 1928	Jan. 31 1928	July 31 1927	July 31 1926	July 31 1928	Jan 31 1928	July 31 1927	July 31 1926
EUROPE :									
(1)	Great Britain ..	79	99	122	120	24	11	17	32
(2)	Germany ..	135	185	220	100	48	31	31	26
(3)	France ..	144	153	148	124	69	32	41	49
(4)	Russia ..	52	16	161	19	—	—	—	—
(5)	Italy ..	143	129	148	124	51	33	33	61
(6)	Czecho-Slovakia ..	50	61	64	41	13	11	9	13
(7)	Belgium ..	43	43	55	31	45	29	24	34
(8)	Spain ..	29	32	29	18	8	5	6	7
(9)	Poland ..	23	19	21	8	7	3	4	2
(10)	Switzerland ..	16	21	21	13	4	2	3	4
(11)	Holland ..	29	34	33	19	14	5	7	7
(12)	Austria ..	15	16	18	13	6	4	4	7
(13)	Sweden ..	21	21	25	19	1	—	—	—
(14)	Portugal ..	4	6	6	4	—	—	—	—
(15)	Finland ..	5	5	5	6	—	—	—	—
(16)	Denmark ..	3	4	3	3	—	—	—	—
(17)	Norway ..	1	1	1	1	—	—	—	—
Europe Total ..		792	845	1,080	663	290	166	179	242
ASIA :									
(1)	India ..	63	23	117	8	864	531	684	607
(2)	Japan ..	206	260	387	207	426	233	568	555
(3)	China ..	58	48	68	35	139	25	77	167
Asia Total ..		327	331	572	250	1,429	789	1,329	1,329
AMERICA :									
(1)	U.S.A. ..	931	1,624	1,325	1,010	5	6	4	10
(2)	Canada ..	53	54	69	36	—	—	—	—
(3)	Mexico ..	—	—	—	2	—	—	—	—
(4)	Brazil ..	—	—	—	—	—	—	—	—
America Total ..		984	1,678	1,394	1,048	5	6	4	10
Sundries ..		9	13	10	8	4	8	3	8
HALF-YEAR'S TOTAL ..		2,112	2,867	3,056	1,969	1,728	969	1,515	1,589

on 1st August, 1928, with previous figures for  
made to the International Cotton Federation

IN THOUSANDS OF ACTUAL BALES  
(regardless of weight)

EGYPTIAN				SUNDRIES				TOTAL				
Half-year ending				Half-year ending				Half-year ending				
July 31 1928	Jan. 31 1928	July 31 1927	July 31 1926	July 31 1928	Jan. 31 1928	July 31 1927	July 31 1926	July 31 1928	Jan. 31 1928	July 31 1927	July 31 1926	
43	36	44	45	58	69	74	45	204	215	257	242	(1)
13	15	16	7	4	6	6	2	200	237	273	135	(2)
19	18	22	26	22	21	19	24	254	224	230	223	(3)
11	10	16	8	230	287	163	257	293	313	340	284	(4)
9	9	11	15	4	5	2	4	207	176	194	204	(5)
4	4	4	4	1	1	1	1	68	77	78	59	(6)
1	1	2	1	11	13	3	2	100	86	84	68	(7)
4	5	5	4	3	2	2	1	44	44	42	30	(8)
1	1	1	2	1	1	1	—	32	24	27	12	(9)
10	17	17	11	2	2	2	—	32	42	43	28	(10)
—	—	—	—	1	1	2	1	44	40	42	27	(11)
1	—	1	1	—	1	—	—	22	21	23	21	(12)
—	—	—	—	1	1	1	—	23	22	26	19	(13)
—	—	—	—	2	2	2	4	6	8	8	8	(14)
—	—	—	—	—	—	—	—	5	5	5	6	(15)
—	—	—	—	—	—	—	—	3	4	3	3	(16)
—	—	—	—	—	—	—	—	1	1	1	1	(17)
116	116	139	124	340	412	278	341	1,538	1,539	1,676	1,370	
2	1	2	3	35	11	23	12	964	566	826	630	(1)
17	23	24	27	46	81	22	30	695	597	1,001	819	(2)
—	—	1	—	181	183	92	170	378	256	238	372	(3)
19	24	27	30	262	275	137	212	2,037	1,419	2,065	1,821	
32	30	39	43	25	21	19	15	993	1,690	1,387	1,078	(1)
1	1	2	2	—	—	—	—	54	55	71	38	(2)
—	1	—	—	45	39	62	25	45	40	62	27	(3)
—	—	—	—	62	78	99	116	62	78	99	116	(4)
33	41	41	45	132	138	180	156	1,154	1,863	1,619	1,259	
2	2	3	2	43	38	31	30	58	61	47	48	
170	183	210	201	777	863	626	739	4,787	4,882	5,407	4,498	

Calculated TOTAL WORLD'S COTTON MILL CON-  
with previous figures for comparison, on basis of Spinners'

COUNTRIES	IN THOUSANDS OF ACTUAL BALES (regardless of weight)							
	AMERICAN				EAST INDIAN			
	Half-year ending				Half-year ending			
	July 31 1928	Jan. 31 1928	July 31 1927	July 31 1926	July 31 1928	Jan. 31 1928	July 31 1927	July 31 1926
EUROPE :—								
(1) Great Britain ..	922	1,027	1,137	937	74	47	34	73
(2) Germany ..	599	677	649	405	117	95	78	72
(3) France ..	422	407	406	424	102	78	68	93
(4) Russia ..	117	376	123	59	—	—	—	1
(5) Italy ..	365	342	338	357	98	81	78	120
(6) Czecho-Slovakia	197	237	236	158	39	39	34	38
(7) Belgium ..	102	113	116	92	83	64	54	71
(8) Spain ..	163	151	151	144	30	34	26	41
(9) Poland ..	145	173	125	89	12	12	13	10
(10) Switzerland ..	29	28	27	31	4	3	3	5
(11) Holland ..	73	74	70	60	18	16	12	14
(12) Austria ..	58	64	66	49	16	18	13	18
(13) Sweden ..	53	52	46	44	1	—	1	1
(14) Portugal ..	22	34	26	33	—	2	—	—
(15) Finland ..	20	21	18	21	—	—	—	—
(16) Denmark ..	10	11	10	9	—	—	—	—
(17) Norway ..	4	4	3	3	—	—	—	—
Europe Total ..	3,301	3,791	3,547	2,915	594	489	414	557
ASIA :								
(1) India ..	21	117	290	8	840	1,000	1,018	1,086
(2) Japan ..	506	572	619	499	565	676	716	889
(3) China ..	146	151	161	74	200	108	201	222
Asia Total ..	673	840	1,070	581	1,605	1,784	1,935	2,197
AMERICA :								
(1) U.S.A. ..	3,070	3,465	3,597	3,132	12	15	15	12
(2) Canada ..	101	94	105	94	—	—	—	—
(3) Mexico ..	—	—	—	4	—	—	—	—
(4) Brazil ..	—	—	—	—	—	—	—	—
America Total ..	3,171	3,559	3,702	3,230	12	15	15	12
Sundries ..	36	36	38	30	9	15	14	21
HALF-YEAR'S TOTAL ..	7,181	8,226	8,357	6,756	2,220	2,303	2,378	2,787

SUMPTION for the Half-year ending 31st July, 1928,  
returns made to the International Cotton Federation.

IN THOUSANDS OF ACTUAL BALES (regardless of weight)												
EGYPTIAN				SUNDRIES				TOTAL				
Half-year ending				Half-year ending				Half-year ending				
July 31 1928	Jan. 31 1928	July 31 1927	July 31 1926	July 31 1928	Jan. 31 1928	July 31 1927	July 31 1926	July 31 1928	Jan. 31 1928	July 31 1927	July 31 1926	
186	172	183	200	201	275	240	166	1,383	1,521	1,594	1,376	(1)
29	34	36	19	16	18	13	5	761	824	776	501	(2)
46	49	49	56	35	41	34	39	605	575	557	612	(3)
34	37	31	24	834	466	762	821	985	879	916	905	(4)
24	24	24	28	12	8	8	11	499	455	448	516	(5)
12	16	14	10	4	2	2	1	252	294	286	207	(6)
2	2	2	2	37	21	12	12	224	200	184	177	(7)
10	11	12	12	5	9	11	7	208	205	200	204	(8)
3	7	6	3	5	3	1	3	165	195	145	105	(9)
24	24	25	18	1	3	1	1	58	58	56	55	(10)
—	—	—	—	1	1	1	2	92	91	83	76	(11)
2	2	2	1	3	1	1	2	79	85	82	70	(12)
—	1	—	—	1	2	1	—	55	55	48	45	(13)
1	—	—	—	12	16	4	11	35	52	30	44	(14)
—	—	—	—	—	—	—	—	20	21	18	21	(15)
—	—	—	—	—	—	1	—	10	11	11	9	(16)
—	—	—	—	—	—	—	—	4	4	3	3	(17)
373	379	384	373	1,167	866	1,092	1,081	5,435	5,525	5,437	4,926	
1	2	1	5	24	29	30	23	886	1,148	1,339	1,122	(1)
20	19	23	19	128	55	50	65	1,219	1,322	1,408	1,472	(2)
—	1	—	—	901	509	558	549	1,247	769	920	845	(3)
21	22	24	24	1,053	593	638	637	3,352	3,239	3,667	3,439	
64	80	85	71	34	30	35	29	3,180	3,590	3,732	3,244	(1)
2	1	5	3	—	—	—	—	103	95	110	97	(2)
1	—	—	—	86	102	81	103	87	102	81	107	(3)
—	—	—	—	257	295	255	420	257	295	255	420	(4)
67	81	90	74	377	427	371	552	3,627	4,082	4,178	3,868	
6	7	8	6	88	83	70	53	139	141	130	110	
467	489	506	477	2,685	1,969	2,171	2,323	12,553	12,987	13,412	12,343	

# **CALCULATED TOTAL WORLD'S COTTON** **years 31st July, 1928, and 31st Jan.,** **the International Cotton**

COUNTRIES	TOTAL ESTIMATED NUMBER OF SPINNING SPINDLES		MULE SPINDLES	
	Half-year ended		Half-year ended	
	July 31, 1928	Jan. 31, 1928	July 31, 1928	Jan. 31, 1928
<b>EUROPE :</b>				
Great Britain ..	57,136	57,101	44,081	43,646
Germany .. ..	11,153	11,020	4,630	4,630
France.. ..	9,770	9,595	3,615	3,530
Russia .. ..	7,311	7,166	2,597	2,597
Italy .. ..	5,189	5,096	689	709
Czecho-Slovakia ..	3,663	3,632	1,700	1,714
Belgium .. ..	2,070	1,976	457	458
Spain .. ..	1,897	1,875	10	10
Poland .. ..	1,544	1,538	496	511
Switzerland .. ..	1,525	1,527	728	733
Holland .. ..	1,111	1,068	245	234
Austria .. ..	1,014	1,044	398	417
Sweden .. ..	619	605	116	118
Portugal .. ..	503	503	173	173
Finland .. ..	252	244	46	46
Denmark .. ..	95	96	5	6
Norway .. ..	52	60	13	13
<b>Total .. ..</b>	<b>104,904</b>	<b>104,196</b>	<b>59,999</b>	<b>59,545</b>
<b>ASIA :</b>				
India .. ..	8,703	8,703	949	949
Japan .. ..	6,272	6,116	42	37
China .. ..	3,504	3,475	—	—
<b>Total .. ..</b>	<b>18,479</b>	<b>18,294</b>	<b>991</b>	<b>986</b>
<b>AMERICA :</b>				
U.S.A. .. ..	35,542	36,349	2,587	2,588
Canada .. ..	1,154	1,153	206	205
Mexico .. ..	840	838	—	—
Brazil .. ..	2,610	2,606	3	3
<b>Total .. ..</b>	<b>40,146</b>	<b>40,946</b>	<b>2,796</b>	<b>2,796</b>
<b>Sundries .. ..</b>	<b>1,574</b>	<b>1,543</b>	<b>180</b>	<b>180</b>
<b>Grand total ..</b>	<b>165,103</b>	<b>164,979</b>	<b>63,966</b>	<b>63,507</b>

**SPINNING SPINDLES (000's omitted) for the half-1928, on basis of returns made to Federation's Statistics.**

RING SPINDLES		SPINNING SPINDLES EGYPTIAN COTTON		SPINDLES IN COURSE OF ERECTION	
Half-year ended		Half-year ended		Half-year ended	
July 31, 1928	Jan. 31, 1928	July 31, 1928	Jan. 31, 1928	July 31, 1928	Jan. 31, 1928
13,055	13,455	18,890	19,001	114	174
6,523	6,390	1,106	1,119	133	225
6,155	6,065	1,672	2,300	71	72
4,714	4,569	300	300	100	45
4,500	4,387	700	660	53	98
1,963	1,918	488	484	15	21
1,613	1,518	30	34	17	66
1,887	1,865	130	155	—	—
1,048	1,077	47	226	54	160
797	794	901	911	20	23
866	834	—	—	33	9
626	627	55	44	4	6
493	487	13	14	10	23
330	330	10	10	—	—
206	198	5	8	13	13
90	90	—	—	—	—
39	47	—	—	—	—
44,905	44,651	24,347	25,266	637	935
7,754	7,754	—	23	56	—
6,230	6,079	550	564	200	100
3,504	3,475	—	—	25	25
17,488	17,308	550	587	281	125
32,955	33,761	2,000	2,000	?	?
948	948	20	73	—	1
840	838	5	4	11	4
2,607	2,603	—	—	2	1
37,350	38,150	2,025	2,077	13	6
1,394	1,363	129	124	16	79
101,137	101,472	27,051	28,054	947	1,145

# COTTON TRADE STATISTICS

## THE WORLD'S COTTON SUPPLIES.

FOR 1927-28, WITH PREVIOUS FIGURES FOR COMPARISON.

Source : *Liverpool Cotton Service.*

	America			India	Egypt	Russia	China	Others	Total	% on 1914
	Lint	Linters	Total							
1914-15 ..	16,135	857	16,992	5,209	1,298	1,164	2,363	1,154	28,180	100
1920-21 ..	13,440	440	13,880	3,600	1,206	121	1,667	1,406	21,880	78
1921-22 ..	7,954	397	8,351	4,485	972	57	1,263	1,310	16,438	59
1922-23 ..	9,762	608	10,370	5,073	1,243	50	1,884	1,500	20,120	71
1923-24 ..	10,140	668	10,808	5,161	1,306	214	1,744	1,746	20,979	74
1924-25 ..	13,628	897	14,525	6,088	1,455	466	1,882	2,062	26,478	95
1925-26 ..	16,104	1,115	17,219	6,215	1,593	715	1,796	2,149	29,687	106
1926-27 ..	17,977	1,158	19,135	5,025	1,727	798	1,483	2,200	30,368	108
1927-28 ..	12,956	<u>950</u>	13,906	5,871	1,219	946	<u>1,800</u>	<u>2,000</u>	<u>25,742</u>	<u>92</u>

Estimates underlined.

## THE SMALLER COTTON CROPS.

Source : *Liverpool Cotton Service.*

In 000's of 500 lb. bales approximate

	1914	1924	1925	1926	1927	1928
Foreign Crops .	406	630	593	457	477	—
Brazil .. ..	123	193	187	227	221	200
Peru .. ..	112	257	205	370	156	—
Mexico .. ..	5	72	138	57	116	—
Argentina .. ..	9	84	89	98	—	—
Other S. American .. ..	13	18	20	19	17	—
West Indies .. ..	68	183	188	240	272	—
Japan and Korea .. ..	71	23	25	28	—	—
East Indies, etc. .. ..	131	93	99	140	180	—
Persia .. ..	148	144	176	181	—	—
Europe and Asia Minor .. ..	3	69	87	88	—	—
Africa .. ..	1,089	1,776	1,807	1,905	—	—
Total .. ..	65	286	342	295	274	—
Empire Crops :						
Sudan .. ..	29	157	145	105	110	—
Uganda .. ..	*	2	2	1	1	—
Kenya .. ..	*	15	17	20	13	18
Tanganyika .. ..	6	7	4	2	3	—
Nyasaland .. ..	*	4	5	1	1	—
Rhodesia (N. & S.) .. ..	*	14	16	8	10	—
S. Africa .. ..	12	32	40	22	16	—
Nigeria, etc. .. ..	—	2	2	3	2	3
Iraq .. ..	5	3	3	4	6	—
Malta and Cyprus .. ..	—	11	6	5	7	—
Australasia .. ..	5	3	4	5	4	—
West Indies .. ..	65	286	342	295	274	—
Total .. ..	1,154	2,062	2,149	2,200	—	—
Grand Total .. ..						

\*Less than 500 bales.

# COTTON TRADE STATISTICS

211

**INDIA.** COTTON YARN PRODUCTION OF INDIA during four months,  
April to July, 1926, 1927 and 1928.

*Source : Dept. of Commercial Intelligence and Statistics, Calcutta.*

DETAILED STATEMENT OF THE QUANTITY (IN POUNDS) AND THE  
COUNTS (OR NUMBERS) OF **YARN** SPUN.

Count or Number					Four months, April to July		
					1926	1927	1928
1	..	..	..	..	1,571,863	3,554,405	474,164
2	..	..	..	..	3,692,369	2,670,167	1,336,070
3	..	..	..	..	1,004,503	705,431	320,891
4	..	..	..	..	3,343,942	3,236,218	1,407,016
5	..	..	..	..	717,908	861,282	669,659
6	..	..	..	..	2,886,332	3,117,719	1,754,275
7	..	..	..	..	7,416,337	6,793,685	2,913,017
8	..	..	..	..	2,274,390	3,729,582	1,181,704
9	..	..	..	..	5,045,482	5,302,253	2,819,945
10	..	..	..	..	8,912,512	6,842,331	3,773,282
Total, Nos. 1 to 10					36,865,638	36,813,073	16,650,023
11	..	..	..	..	15,525,487	12,753,582	8,185,971
12	..	..	..	..	9,080,734	10,021,523	5,192,908
13	..	..	..	..	7,546,158	8,874,863	6,469,731
14	..	..	..	..	9,033,023	10,120,101	5,754,944
15	..	..	..	..	8,771,606	7,703,593	4,709,649
16	..	..	..	..	9,893,284	11,853,121	7,134,403
17	..	..	..	..	5,670,190	7,145,349	3,936,261
18	..	..	..	..	7,726,113	8,001,046	5,747,712
19	..	..	..	..	5,027,618	5,075,373	4,049,963
20	..	..	..	..	52,896,139	53,107,288	32,451,788
Total, Nos. 11 to 20					131,170,352	134,655,839	83,633,330
21	..	..	..	..	20,884,099	21,272,838	11,967,044
22	..	..	..	..	15,498,994	17,709,192	11,487,259
23	..	..	..	..	3,397,575	3,438,813	2,511,415
24	..	..	..	..	18,747,685	20,525,388	11,095,488
25	..	..	..	..	1,163,815	1,363,982	1,165,016
26	..	..	..	..	5,347,481	4,990,890	3,383,466
27	..	..	..	..	2,380,618	2,437,480	705,472
28	..	..	..	..	5,139,759	4,690,563	4,348,332
29	..	..	..	..	804,911	823,012	597,114
30	..	..	..	..	14,600,515	14,438,002	12,990,334
Total, Nos. 21 to 30					87,965,452	91,690,160	60,700,940
31	..	..	..	..	713,552	573,536	620,066
32	..	..	..	..	3,978,251	4,201,929	4,037,449
33	..	..	..	..	499,553	685,751	299,256
34	..	..	..	..	585,350	579,125	584,240
35	..	..	..	..	167,039	81,062	55,037
36	..	..	..	..	638,373	1,033,521	446,866
37	..	..	..	..	—	9,185	22,315
38	..	..	..	..	135,315	122,841	70,183
39	..	..	..	..	6,095	—	25,927
40	..	..	..	..	2,900,249	3,689,954	3,500,343
Total, Nos. 31 to 40					9,623,777	10,976,904	9,661,682
Above 40					3,482,152	4,046,825	2,551,758
Wastes, etc.					511,685	2,129,497	1,669,588
GRAND TOTAL					*267,619,080	280,312,298	74,867,321

\* Includes 24lbs. of yarn for which details are not available.

## COTTON TRADE STATISTICS

COTTON CLOTH PRODUCTION OF INDIA during four months, April to July,  
1926, 1927 and 1928.

Source : Dept of Commercial Intelligence and Statistics, Calcutta

DETAILED STATEMENT OF THE QUANTITY (IN POUNDS AND  
THEIR EQUIVALENT IN YARDS) AND DESCRIPTION OF **WOVEN  
GOODS** MANUFACTURED

		Four months, April to July		
Description		1926	1927	1928
Grey and bleached piece goods				
Chadars .. .. .	lbs	8,236,344 ..	9,018,510 .	4,876,503
	yds	23,030,765 ..	23,805,068 ..	14,151,486
Dhutis .. .. .	lbs	42,642,524 ..	45,040,317 .	36,717,219
	yds	204,200,844 ..	213,163,032 ..	174,549,745
Drills and jeans	lbs	5,842,564 ..	7,073,050 ..	4,575,859
	yds	23,773,189 ..	28,348,858 ..	18,783,001
Cambrics and lawns	lbs	217,302 ..	288,018 ..	252,975
	yds.	1,119,862 .	1,542,633 ..	1,434,275
Printers .. .. .	lbs	1,689,342 ..	1,432,928 .	1,552,276
	yds.	7,433,081 .	6,327,709 ..	7,599,315
Shirtings and longcloth	lbs	52,185,206 ..	49,532,045 ..	25,846,825
	yds	227,186,448 ..	215,752,600 .	116,629,297
T-cloth, domestics, and sheetings .. .. .	lbs.	6,458,294 ..	7,943,930 ..	5,008,644
	yds	26,764,985 ..	30,369,050 ..	21,025,322
Tent-cloth .. .. .	lbs	486,229 ..	580,912 ..	756,567
	yds.	1,207,748 ..	1,275,976 ..	1,717,320
Khadi, Dungri or Khaddar .. .. .	lbs.	8,318,897 ..	12,371,465 ..	7,207,954
	yds.	23,790,121 ..	35,182,123 ..	22,698,068
Other sorts .. .. .	lbs	3,766,630 ..	3,663,006 ..	2,311,653
	yds	14,404,837 ..	15,229,820 ..	10,017,874
Total .. .. .				
	lbs.	129,843,332 ..	136,944,181 ..	89,106,475
	yds	552,911,880 ..	570,996,869 ..	388,605,703
Coloured piece goods ..				
	lbs.	44,127,401 ..	48,385,134 ..	24,985,695
	yds.	210,962,375 ..	221,741,102 ..	121,084,591
Grey and coloured goods, other than piece goods	lbs	1,649,176 ..	1,368,543 ..	828,109
	doz.	382,329 ..	310,789 ..	187,450
Hosiery .. .. .	lbs.	335,512 ..	393,479 ..	504,324
	doz.	119,028 .	142,236 ..	146,485
Miscellaneous .. .. .	lbs.	1,500,057 ..	2,074,787 ..	1,185,204
Cotton goods mixed with silk or wool .. .. .	lbs.	770,542 ..	1,698,738 ..	1,066,184
GRAND TOTAL..				
	lbs.	178,226,020 ..	190,864,862 ..	117,675,991
	yds.	763,874,255 ..	792,737,971 ..	509,690,294
	doz	501,357 ..	453,025 ..	333,935



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## JAPAN

## COTTON MILL WORKING SPINDLES AND DOMESTIC USE IN JAPAN.

*Source : Japan Cotton Spinners' Association, Osaka.*

Month	Average working spindles	Cotton yarn production in kwans <sup>1</sup>	Yarn consumption of weaving (sub-work by spinners only) in kwans <sup>1</sup>	Cotton yarn export in kwans <sup>1</sup>	Domestic use of cotton yarn in kwans <sup>1</sup>
<b>1926</b>					
Jan. ..	4,869,831	205,660.0	56,606	18,919	130,135.0
Feb. ..	4,895,850	214,530.0	58,385	19,434	136,711.0
March..	4,936,120	216,330.5	59,650	26,098	130,582.5
April ..	4,964,512	225,505.5	63,538	22,844	139,123.5
May ..	5,005,977	225,901.5	65,687	22,661	137,553.5
June ..	5,025,793	227,588.0	68,403	14,498	144,687.0
July ..	5,016,467	208,303.0	60,546	9,327	138,430.0
Aug. ..	4,982,346	201,992.0	57,473	7,634	136,885.0
Sept. ..	5,057,592	212,780.5	60,922	12,382	139,476.5
Oct. ..	5,076,217	215,803.0	61,506	15,826	138,471.0
Nov. ..	5,097,853	226,695.0	64,514	17,316	144,865.0
Dec. ..	5,106,627	226,657.5	63,255	16,566	146,836.5
Average Spindles & Totals	<u>5,002,932</u>	<u>2,607,746.5</u>	<u>740,485</u>	<u>203,505</u>	<u>1,663,736.5</u>
<b>1927</b>					
Jan. ..	5,151,080	215,371.0	60,020	12,562	142,789.0
Feb. ..	5,138,724	220,727.5	60,345	13,007	147,375.5
March..	5,168,128	224,450.5	62,296	11,723	150,431.5
April ..	5,222,378	234,889.0	65,655	10,617	158,617.0
May ..	4,672,715	208,978.0	62,604	12,531	133,843.0
June ..	4,648,715	209,414.0	62,973	9,619	136,822.0
July ..	4,612,382	196,880.5	59,067	7,015	130,798.5
Aug. ..	4,622,830	197,104.0	57,606	10,989	128,509.0
Sept. ..	4,689,942	202,753.0	60,148	9,997	132,608.0
Oct. ..	4,680,080	206,741.5	60,064	8,157	138,520.5
Nov. ..	4,706,001	208,599.5	60,934	5,286	142,379.5
Dec. ..	4,664,180	204,784.0	61,199	3,782	139,803.0
Average Spindles & Totals	<u>4,831,430</u>	<u>2,530,692.5</u>	<u>732,911</u>	<u>115,285</u>	<u>1,682,496.5</u>
<b>1928</b>					
Jan. ..	4,702,892	194,377.5	56,721	5,892	131,764.5
Feb. ..	4,673,027	198,098.5	59,879	6,656	131,563.5
March..	4,677,424	194,015.0	60,010	6,035	127,970.0
April ..	4,691,707	200,579.0	61,858	5,438	133,283.0
May ..	4,742,737	200,955.0	61,925	8,472	130,558.0
June ..	4,736,784	199,058.5	62,424	6,720	129,914.5
July ..	4,909,776	201,131.0	63,528	4,616	132,987.0
Aug. ..	4,909,865	204,445.0	62,478	3,812	138,155.0

<sup>1</sup> 1 kwan = 8.267 lbs.

Japan has now 6,272,000 spinning spindles, of which over 1,000,000 are stopped.

The Japan Spinners' Association has extended the restriction of output to June 30, 1929, with special exemption applied to those mills which abolish night work prior to that date. At that date night work ceases by law.

## GERMANY'S EXPORTS OF WOVEN COTTON GOODS DURING THE FIRST HALF-YEAR OF 1928.

Total to all countries, R M. 223,300,000 = £1,116,500.

17 countries are specified, viz. (in Marks) :

Great Britain	Holland	U.S.A.	Sweden	Switzerland	Denmark
34.5	17.1	28.2	12.5	8.8	11.5
Austria	Norway	Italy	Argentina	Czecho-Slovakia	
10.5	4.8	11.6	5.2	1.7	
Finland	Roumania	China	British India	Hungary	Japan
3.0	5.4	1.3	3.8	4	0.4

Of the textile goods exports, cotton piece goods represent 43.5 per cent, against 44.2 per cent. in the same period of 1927.

## COTTON YARN EXPORTS OF THE EUROPEAN COUNTRIES.

(Source: Dr. KARL UHLIG, in *Mitteilungen des Allgemeinen Deutschen Textilverbandes, Reichenberg, Czecho-Slovakia.*)

In 1,000 tons. Excess Yarn Exports (Yarn Exports less Imports).

	England	France	Belgium	Italy	Czecho-Slovakia	Austria
1913	100	6	4	14	—	—
1924	78	12	8	17	14	9
1925	90	6	8	15	23	12
1926	81	-2*	6	13	14	10
1927	93	27	—	21	28	12

\* Excess of imports.

	Germany	Holland	Hungary	Poland	Jugo-Slavia	Rumania
1913	16	—	—	—	—	—
1924	38	31	7	1	7	10
1925	56	32	6	—	8	11
1926	16	28	7	—	8	—
1927	58	—	9	2	11	—

The order of importance of cotton-yarn exporting countries is: England, Japan, Czecho-Slovakia, France, Italy, Austria. The largest importing countries, in order of quantities, are: Germany, Holland, Rumania, Jugo-Slavia.

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## U.S.A.

MONTHLY FIGURES OF THE ASSOCIATION OF COTTON TEXTILE  
MERCHANTS OF NEW YORK, AND THE COTTON TEXTILE INSTITUTE,  
SHOWING THE STATE OF TRADE 1927-28

(as published by the Liverpool Cotton Service)

		(Millions of yards)					
		Oct.	Nov.	Dec.	Jan.	Feb.	Mar.
Production .. ..		332	322	372	298	300	358
Weekly rate .. ..		83.0	80.5	74.0	74.5	75.0	71.6
Sales .. ..		226	194	375	194	256	350
Percentage on production ..		68.0	60.3	100.8	65.2	85.3	97.7
Shipments .. ..		293	286	328	267	285	338
Percentage on production ..		88.4	89.0	88.2	89.7	95.0	94.3
Stocks .. ..		257	293	337	367	382	403
Change .. ..		—	+36	+44	+30	+15	+21
Unfilled Orders .. ..		432	340	387	314	285	297
Change .. ..		—	-92	+47	-73	-29	+12

## CENSUS BUREAU (000's running bales)

	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.
Consumption .. ..	613	626	544	582	574	581
Daily rate .. ..	26.7	26.6	25.3	24.8	25.5	23.7
Percentage change from previous season .. ..	+10.4	+6.8	-5.6	-5.4	-6.9	-14.5

	Apl.	May	June	July	Aug.	Sept.
Production .. ..	286	349	288	222	502	254
Weekly rate .. ..	71.5	69.8	72.0	55.5	60.5	63.4
Sales .. ..	335	270	267	187	341	387
Percentage on production ..	117.2	77.2	92.8	84.5	112.7	152.6
Shipments .. ..	270	326	270	218	324	278
Percentage on production ..	94.5	93.0	93.9	98.1	107.1	109.6
Stocks .. ..	418	442	459	463	442	417
Change .. ..	+15	+24	+17	+4	-21	-25
Unfilled Orders .. ..	362	306	302	272	289	398
Change .. ..	+65	-56	-4	-30	+17	+109

## CENSUS BUREAU (000's running bales)

	Apl.	May	June	July	Aug.	Sept.
Consumption .. ..	525	578	511	439	527	492
Daily rate .. ..	22.8	23.6	21.7	19.1	—	—
Percentage change from previous season .. ..	-13.3	-12.0	-21.1	-24.5	—	—

# U.S. COTTON GOODS EXPORTS for 12 months ending June 1927 and 1928.

Articles	Unit of Quantity	Twelve months ending June			
		1927		1928	
		Quantity Thou- sands	Value 1,000 \$	Quantity Thou- sands	Value 1,000 \$
Cotton, semi-manufactures .. ..	lb.	122,124	20,128	127,747	25,250
Cotton mill waste .. ..	"	81,656	6,782	82,701	8,552
Cotton rags, except paper stock ..	"	14,372	920	17,157	1,237
Cotton yarn :					
Carded yarn, not combed .. ..	"	16,283	5,215	15,685	5,588
Combed yarn .. ..	"	4,422	3,179	—	—
Mercerized .. ..	"	4,152	3,453	9,598	8,513
Not mercerized .. ..	"	1,239	579	2,606	1,360
Cotton manufactures .. ..		—	103,720	—	110,161
Cotton thread and cordage :					
Sewing thread .. ..	"	1,321	1,219	1,097	1,049
Crochet, darning and em- broidered cotton .. ..	"	146	169	141	165
Twine and cordage .. ..	"	4,915	1,699	4,159	1,567
Cotton cloth, duck and tire fabric .. ..	sq. yd.	533,503	71,529	539,186	78,230
Tire fabric :					
Cord .. ..	"	1,522	643	4,960	2,116
Other .. ..	"	1,410	424	1,599	425
Cotton duck .. ..	"	13,285	4,333	14,517	4,782
Unbleached .					
Ounce .. ..	"	5,892	1,719	5,244	1,492
Numbered .. ..	"	4,858	1,852	5,855	2,217
Bleached .. ..	"	1,364	406	2,197	681
Coloured .. ..	"	1,171	356	1,221	392
Cotton cloth .. ..	"	517,286	66,138	518,110	70,907
Unbleached (grey) .. ..	"	128,203	11,739	110,630	10,528
Bleached .. ..	"	92,211	10,567	87,403	10,168
Coloured .. ..	"	296,872	43,832	320,077	50,211
Other cotton fabrics :					
Blankets .. ..	lb.	1,497	862	1,580	921
Damasks .. ..	sq. yd.	318	94	580	148
Pile fabrics, plushes, vel- veteens and corduroys .. ..	"	514	501	645	531
Tapestries and other uphol- stery goods .. ..	"	75	103	240	151
Cotton fabrics sold by the lb.	lb.	2,814	1,153	6,144	2,353
Cotton wearing apparel .. ..		—	15,983	—	15,433
Knit goods :					
Gloves .. ..	doz. prs.	132	192	109	174
Hosiery .. ..	"	4,461	7,581	4,021	6,987
Underwear .. ..	doz.	671	2,551	668	2,624
Sweaters, shawls and other knit outerwear .. ..	No.	454	392	487	396

Articles	Unit of Quantity	Twelve months ending June			
		1927		1928	
		Quantity Thou- sands	Value 1,000 \$	Quantity Thou- sands	Value 1,000 \$
Other wearing apparel :					
Collars and cuffs .. ..	doz.	339	510	334	494
Cotton overalls, breeches and pants .. ..	"	12	165	22	283
Underwear, not knit .. ..	"	182	827	149	724
Shirts .. ..	"	204	2,085	188	1,812
Dresses, skirts and waists ..	No.	200	208	403	486
Other cotton clothing ..		—	1,472	—	1,453
Other cotton manufactures :					
Handkerchiefs .. ..	doz.	262	172	177	123
Laces, embroideries, and lace window curtains .. ..	yd.	7,668	236	4,710	212
Cotton belting for machinery	lb.	495	302	488	291
Cotton bags .. ..	"	5,756	1,490	6,904	1,521
Quilts, comforts, counterpanes and bedspreads .. ..	No.	79	132	134	195
Bed sheets, pillow, bolster and mattress cases .. ..	doz.	21	158	28	190
Towels, bath mats and wash cloths .. ..	"	463	913	605	960
Other cotton manufactures ..		—	7,005	—	6,121

MONTHLY AVERAGE PRICES OF COTTON AND MANUFACTURED  
COTTON GOODS EXPORTED FROM U.S.A.

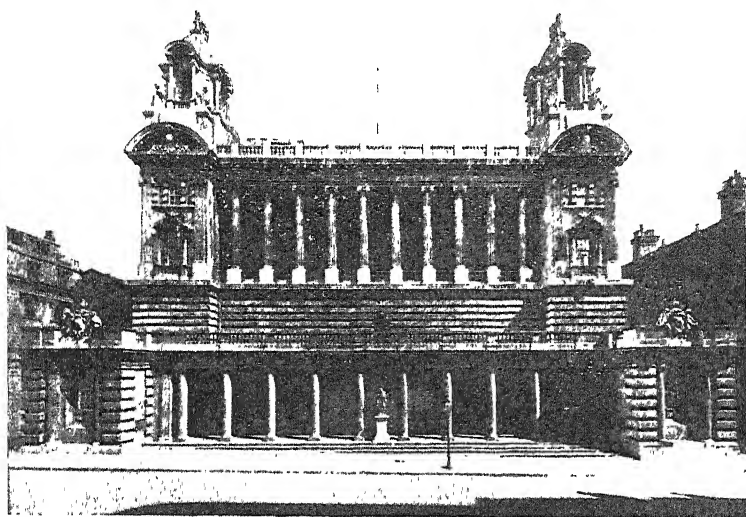
	Unit	1927		1928		
		Cal. yr.	June	April	May	June
Cotton and manufactures :						
Unmanufactured .. lb.		·169	·154	·200	·210	216
Cloths :						
Duck .. .. sq yd.		·313	·295	·342	·321	·344
All other cloths :						
Unbleached .. .. "		·091	·088	·093	·092	·102
Bleached .. .. "		·114	·107	·112	·121	·119
Coloured .. .. "		·147	·145	·164	·168	·163
Hosiery .. .. doz. prs.		1·69	1·57	1·71	1·67	1·76

U.S. COTTON GOODS IMPORTS for Fiscal Years 1927  
and 1928

Articles	Unit of Quantity	Twelve months ending June			
		1927		1928	
		Quantity Thou- sands	Value 1,000 \$	Quantity Thou- sands	Value 1,000 \$
Cotton, unmanufactured .. lb.		190,963	37,206	175,450	44,803
Long staple .. .. free	"	48,913	12,461	55,033	18,137
Short staple .. .. "	"	142,050	24,745	120,417	26,666
Cotton semi-manufactures ..		—	5,635	—	5,952
Cotton waste .. .. "	"	26,407	1,593	37,427	2,556
Yarns and warps :					
Not bleached, dyed, coloured, etc. . . . . dut.	"	75	57	18	21
Bleached, dyed, coloured, combed or plied .. dut.	"	3,585	3,985	2,698	3,375

## COTTON TRADE STATISTICS

Articles	Unit of Quantity	Twelve months ending June			
		1927		1928	
		Quantity Thou- sands	Value 1,000 \$	Quantity Thou- sands	Value 1,000 \$
Cotton manufactures .. ..		—	58,682	—	62,008
Sewing thread, crochet, darn- ing and knitting cotton dut	yd	2,103,012	2,146	1,944,358	1,621
Cotton cloth .. .. .	sq. yd	56,248	14,511	65,567	16,365
Not bleached .. dut.	"	25,248	4,726	25,364	5,093
Bleached .. .. "	"	7,771	1,810	12,386	2,489
Printed, dyed, coloured or woven-figured .. dut.	"	23,144	7,975	27,817	8,783
Cotton fabrics, n.e.s. .. ..		—	8,432	—	9,096
Damask and manufactures dut		—	307	—	298
Pile fabrics and manufactures		—	2,478	—	2,926
Tapestries & other Jacquard- woven upholstery goods dut		—	5,017	—	5,270
Blankets .. .. "	No	704	328	611	290
Table covers, napkins, doilies, etc .. .. .		—	302	—	312
Wearing apparel . . . .		—	13,628	—	15,297
Product of the Philippine Islands .. .. free		—	4,817	—	3,141
Knit goods :					
Gloves .. .. dut.	doz prs.	1,912	5,611	2,444	7,679
Hosiery .. .. "	"	471	1,549	642	2,150
Underwear and other knit goods .. .. dut.	doz	90	305	156	431
Wearing apparel, wholly or partly of lace, or em- broidered, beaded, etc. dut.		—	555	—	824
All other .. .. "		—	791	—	1,072
Other cotton manufactures ..		—	19,965	—	19,629
Handkerchiefs and mufflers . Not of lace or embroidered, etc. .. .. dut.	lb	220	688	219	675
Lace trimmed or embroidered, etc. .. .. dut.	"	267	1,296	365	1,288
Laces, embroideries, etc. ..		—	12,603	—	11,776
Product of the Philippine Islands .. .. free		—	378	—	443
Hand-made laces .. dut		—	1,046	—	997
Machine-made laces ..		—	4,960	—	4,534
Articles in part of lace ..		—	1,256	—	1,541
Nets, nettings, veils and veilings .. .. dut.		—	1,187	—	1,561
Lace window curtains ..	sq. yd.	1,740	568	2,451	674
Embroideries .. .. "		—	748	—	594
All other laces, embroideries, etc. .. .. dut.		—	2,460	—	1,432
Other cotton manufactures, n.e.s. .. .. dut.		—	5,378	—	5,890



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## Reviews on Current Cotton Literature.

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"YEAR BOOK OF AGRICULTURE, 1927." The U.S. Government Department of Agriculture has published recently a 1,234-page volume, showing its wide ramifications. Statistics on all the crops are given. Cotton is dealt with on many pages. The book is mainly prepared for reference. The Department has 21,661 employees on its pay-rolls and expended in 1927 more than \$153,000,000 for all purposes. Evidently the U.S. consider this a very good investment, viz., \$1.25 per head of population. If India, Brazil or any of the South American Republics would spend a quarter of that money on their departments of agriculture, they would make faster headway not only in cotton but also in other produce.

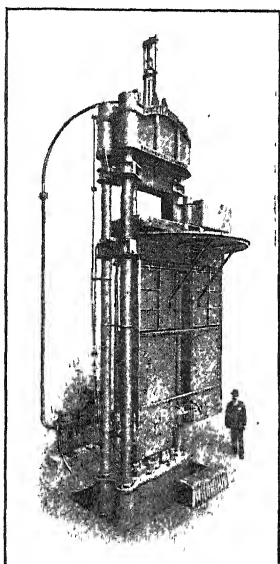
"1928 YEAR BOOK OF THE NATIONAL ASSOCIATION OF COTTON MANUFACTURERS, BOSTON, MASS." The Secretary, Mr. Russel T. Fisher, is to be congratulated on this the 11th edition of the Year Book, which is particularly valuable as a statistical reference book on cotton from all parts of the world. The technical section gives useful information on power requirements per machine, card settings, comparison of French and English counts, construction of standard fabrics, etc.

The *Transactions* of two meetings of the National Association of Cotton Manufacturers, Boston, have been issued. Of particular interest is the description of Cotton Style Shows and the excellent results obtained. Woman after woman in every city said: "I had no idea cotton could be so pretty"; "I had forgotten, how inexpensive it was"; "I did not realize the colours were fast." Evidently the Cotton Industry could obtain a much larger business by advertising, particularly through travelling style shows. Other papers of interest dealing with taxation, humidification, new uses of cotton are in the book.

"Mechanical Accessory Means in the Finishing of Textile Goods," is a section of Vol. IV/3 of "TECHNOLOGIE DER TEXTILFASERN," by Dr. R. O. Herzog, published at RM. 67.50 (£3 5s.) by Julius Springer, Berlin. The new volume (in German, but printed in Latin characters) contains two distinct sections, viz., "The Chemical Technology of Cotton," by Dr. R. Haller, Bale, and "The Mechanical Accessory Means for Finishing Textile Goods," by Prof. Hugo Glafey, Heidelberg. The latter will appeal more to the members of this Federation; it deals with the washing, bleaching, mercerizing, dyeing, impregnation, drying, printing, singeing, cleaning, polishing, raising, curling, calendering, etc. Illustrations of the machines described and generally used are given, together with addresses of makers. As the German finishing industry is highly appreciated everywhere and as German finishing machines are working in every country where cotton goods are produced, this book will appeal not only to the German-speaking nations but also to others.

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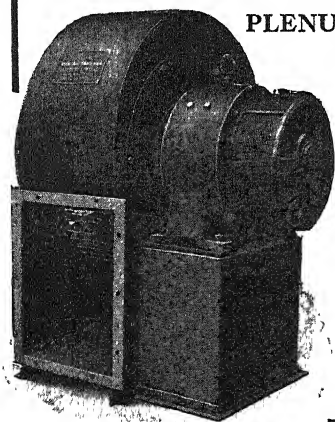
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"SKINNERS' COTTON TRADE DIRECTORY OF THE WORLD, 1928-29," has been issued, and, as its many forerunners, it is an excellent publication, invaluable to all those who have dealings with cotton mills, cotton exporters, importers, machinists, etc. In its 1,500 pages will be found all and everybody connected with the world-wide ramification of the cotton industry and trade. The book is published at 30s. net by Thomas Skinner & Co., Gresham House, Broad Street, London, E.C.2.

"DAVISON'S TEXTILE BLUE BOOK, 1928," with Dockham's American Report and Directory of the Textile Manufacture and Dry Goods Trade is in its 41st edition, sold abroad at \$8, by Davison Publishing Co., New York. The book shows particulars of every textile mill. It comprises: Directory of Cotton Mills; Woollen Mills; Worsted Mills; Silk Mills; Knitting Mills; Mexican Mills; Dyers and Finishers; Mills with Dye Houses; Commission Merchants; Cotton Dealers (both domestic and foreign); Cotton Compresses and Warehouses (Domestic); Wool Dealers; Linter Dealers; Waste Dealers and Manufacturers (both domestic and foreign); Wholesale Rag and Remnant Dealers; Textile Supplies; New Textile Mills; Classical Directory of Mills. The book refers particularly to U.S.A., but includes also some 150 pages of foreign firms.

"DIE ENTWICKLUNG DER ÄLTESTEN KONTINENTALEN SPINNEREI," by Dr. Franz Joseph Gemmert; published by Dr. Max Jänicke, Leipzig. This book describes in 180 pages the development of the oldest Continental cotton-spinning mill at Cromford, Germany. It is written in German, and in it the author reviews in most fascinating language the different inventions that have taken place in the cotton industry, and particularly the pioneer work of the family of Brügelmann. One chapter deals with the social conditions, compares working hours and wages of the period from 1870 to 1923. The book is written in a most entertaining way, and should appeal to every student fond of history.

"ANNUAL HANDBOOK OF DAILY RECORDS OF CROP STATISTICS, 1928," issued by Comtelburo Ltd., 11, Tokenhouse Yard, London, E.C. This very excellent compilation of cotton statistics is now in its 58th year and as the whole of the system of collection and publication of statistics as heretofore has been adhered to the book requires no further words of recommendation. The reviewer has this handbook always on his desk, and refers to it in the course of business very frequently.

"MARKETING AMERICAN COTTON IN ENGLAND" Technical Bulletin No. 69, June, 1928, issued by the United States Department of Agriculture, Washington, and written by Dr. Alonzo B. Cox.

This is the companion volume to "Marketing American Cotton on the Continent of Europe." The author deals with the Manchester yarn and cloth market, the Manchester raw cotton market, the Liverpool cotton market, the Liverpool spot market, methods of marketing cotton to spinners in Liverpool, Liverpool merchants' methods of buying American cotton, Liverpool cotton futures market.

The writer, in the course of his rather short description of the Manchester Ship Canal, says: "The space available for warehousing cotton in Manchester is estimated to be sufficient to care for 500,000 bales at one time. In many cases the warehouses are of the type of safes or vaults. Manchester is a newer port than Liverpool, and, on the whole, has good facilities for unloading, handling and forwarding cotton to the mills."

"ARTIFICIAL SILK," by Ing. Dr. Franz Reinthaler, translated by F. M. Rowe, D.Sc., F.I.C., published by Chapman & Hall, Ltd., London, at 21s. net.

The present book is not merely a translation of the original German work but is considerably enlarged. The book has been written with a view to instructing those engaged in merchandising textiles with the development and manufacture of artificial silk, in order that they may understand the manifold causes to which defective goods are due. The much talked-of Lilienfeld process is also described.

"*Bulletin of the Imperial Institute*," Vol. 26, No. 3, 1928. Published at 3/6 net; annual subscription, 15s. London: John Murray, Albemarle Street, W.

"*Giornale degli Economisti e Rivista di Statistica*," September, 1928. Roma, Via del Tritone, 67.

This issue deals with the reserve of gold of America, and gives statistics on the Italian banking organization.

The August number contains reports on the Bolshevik monetary reforms and on arithmetical and geometrical averages in the calculation of index figures.

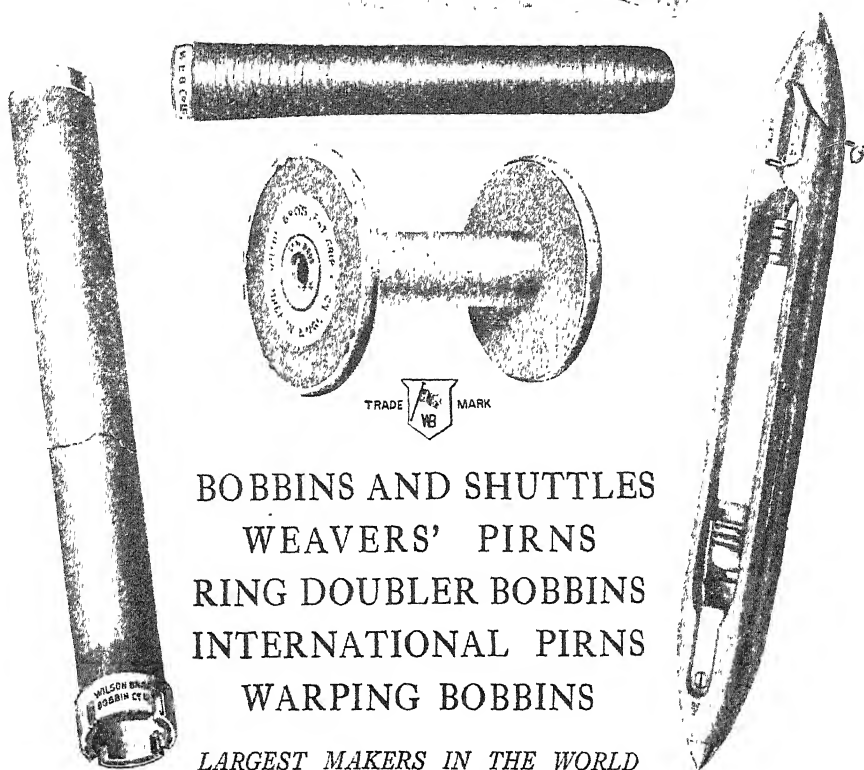
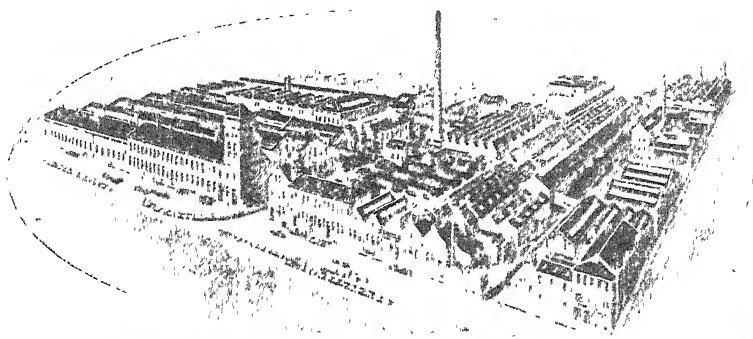
"*Memoirs of the Cotton Research Station, Trinidad*," published by the Empire Cotton Growing Corporation, 2, Wood Street, Millbank, London, S.W.1. Series B; Physiology; Studies on the Transport of Carbohydrates in the Cotton Plant, by T. G. Mason and E. J. Maskell.

"JOURNAL OF THE TEXTILE INSTITUTE," No. 10, Vol. XIX, October, 1928. This number is particularly interesting on account of a paper read by Mr. J. Reed on "Cotton Waste Spinning: English and Continental Methods."

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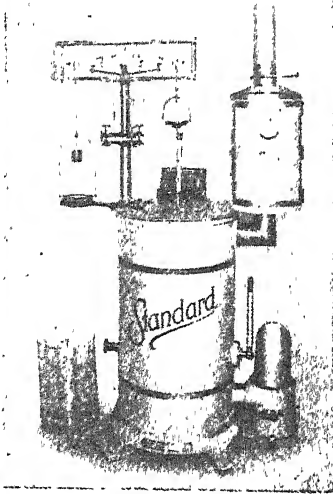
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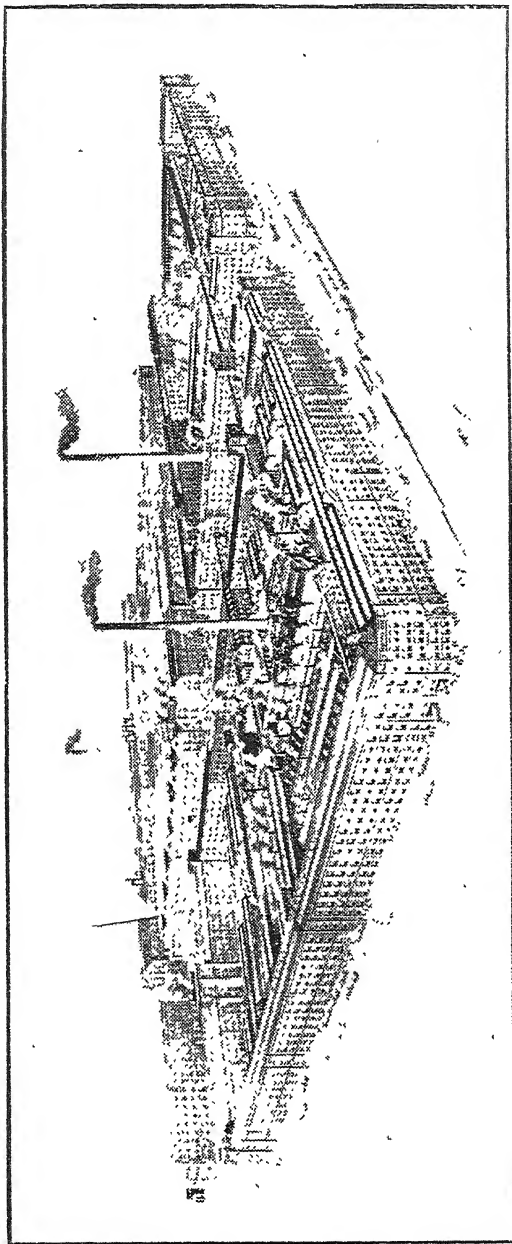
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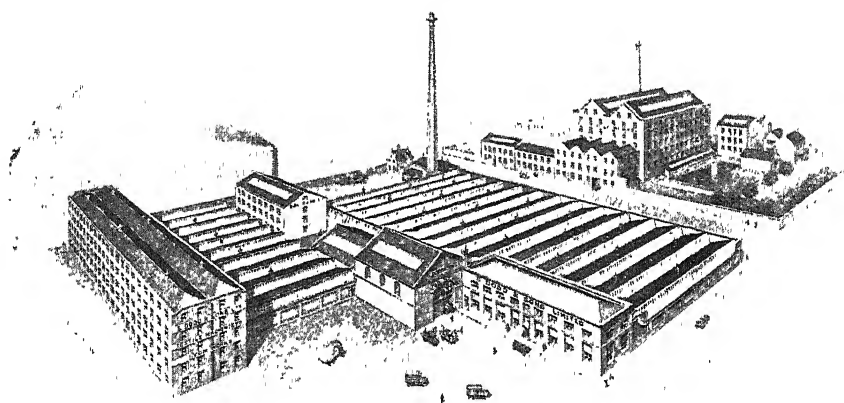
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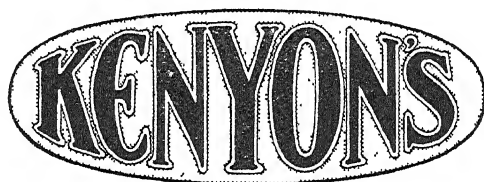
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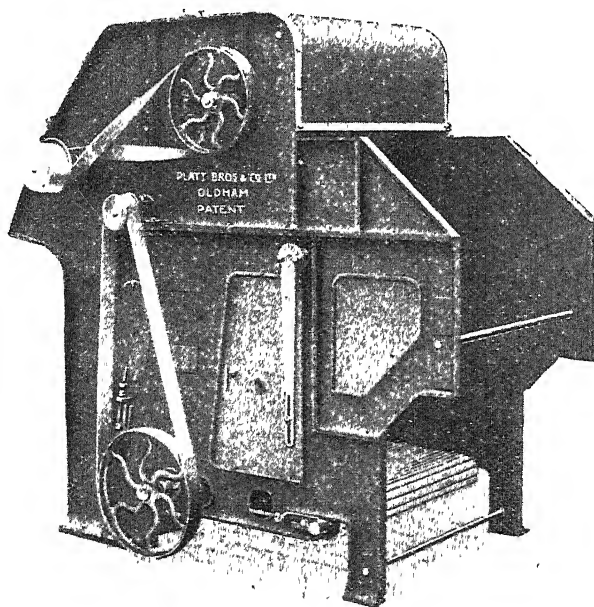
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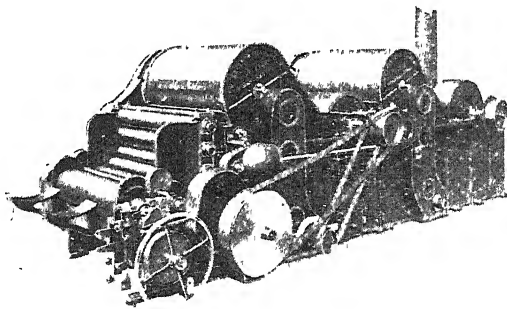
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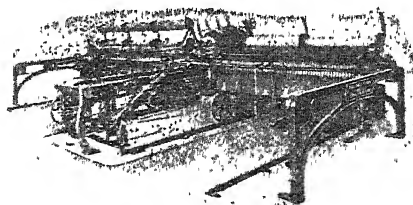
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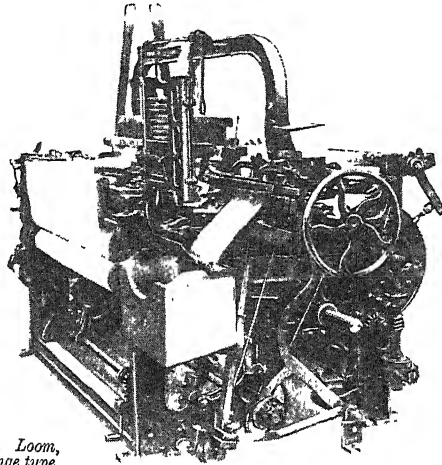
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	PAGE		PAGE
ADOLF, EMIL, A.G. . . . .	383	LIVERPOOL COTTON ASSOCIATION. . .	393
ALBRECHT, F., & Co. . . . .	380	LORD BROS., LTD . . . . .	328
ALEXANDRIA COMMERCIAL Co . .	318	MANCHESTER RAW COTTON Co.,	
AMERICAN COTTON GROWERS' EX-		LTD . . . . .	384
CHANGE . . . . .	front cover	MANCHESTER SHIP CANAL Co. . .	1
ANDERSON, CLAYTON & Co . . .	270	MATTHEWS & YATES, LTD. . .	335
AUGUSTINO, P., & Co. . . . .	317	MEYNELL, HENRY, & Co. . . .	332
BAER, HENRY, & Co . . . . .	390	MUNDS & WINSLOW . . . . .	301
BARBER & COLMAN, LTD . . .	344	MURRAY GIN Co . . . . .	279
BARCELONA INTERNATIONAL EX-		NEAL, W. C. . . . .	272
HIBITION . . . . .	vii	PFIEGER, PAUL, & Co . . . . .	208
BEHR, OTTO . . . . .	291	PLATT BROS & Co., LTD . . .	385
BOND, McENANY & Co . . . .	291	PORT OF MANCHESTER WAREHOUSES	377
BRITISH NORTHROP LOOM Co,		PUGH-LYONS & Co . . . . .	281
LTD, THE . . . . .	331	REED, M. H., & Co. . . . .	303
BROOKS & DOXEY (1920), LTD. .	328	REINHART & Co . . . . .	311
CHACHATY FRERES . . . . .	388	REYNOLDS & GIBSON . . . .	304
CITY WAREHOUSE WINDOW CLEAN-		RIETER & Co, JOHN JACOB . .	327
ING Co., LTD. . . . .	360	RUTI MACHINE Co. . . . .	327
" COMMERCE & FINANCE " . . .	256	SALVAGO, C M., & Co. . . . .	318
CONTINENTAL GIN COMPANY . .	304	SCOTT & Co. . . . .	303
COOK, THOS., & SON, LTD. . .	378	SKINNER, THOS., & Co. . . .	264
CRÉDIT GÉNÉRAL DE BELGIQUE .	250	SOC. ALSACIENNE DE CONSTRUC-	
" CASTLE LINE " . . . . .	303	TIONS MÉCANIQUES . . . . .	383
DAVISON'S TEXTILE BLUE BOOK .	280	SOUTHERN COTTON COMPANY . .	300
DEAN & DAWSON, LTD. . . . .	301	STANDARD MARINE INSURANCE Co.	307
DELTA & PINE LAND Co. . . . .	297	STEWART BROTHERS COTTON COM-	
DIXON, R. L., & BROTHER . . .	201	PANY . . . . .	283
DOBSON & BARLOW, LTD. . . .	343	STUBBS, JOSEPH, LTD. . . . .	392
DODD, S., & SONS . . . . .	387	TARVER, STEELE & Co. . . . .	284
DRAPER CORPORATION . . . . .	292	TAYLOR, LANG & Co., LTD . .	386
ECONOMOU, G. D., & Co. . . .	317	TETLOW, HENRY, & SONS . . .	336
EGYPTIAN PRODUCE TRADING Co.	312	TEXAS FARM BUREAU . . . . .	275
FRANÇOIS, L. F., & CIE. . . . .	297	TEXTILE DEVELOPMENT Co. . .	255
GREER STAPLE COTTON COMPANY	298	" TEXTILE, LA," SOCIÉTÉ Co-	
HETHERINGTON, JOHN, & Co., LTD.	388	OPÉRATIVE . . . . .	378
HOWARD & BULLOUGH, LTD. . .	389	TWEEDALES & SMALLEY (1920),	
HUDSPETH, G. J., & Co. . . . .	284	LTD. . . . .	382
HUSNI, SONS & CHINASSI . . . .	391	UNIVERSAL WINDING Co. . . .	v
JOANNIDES, J. G., & Co. . . . .	321	VICKERS (CRAYFORD), LTD. . .	iii
JONES, A. LYNTON, & Co. INC. .	291	WELD & Co. . . . .	375
KENYON, JAMES, & SON, LTD. . .	395	WESTERN UNION TELEGRAPH Co. .	283
KUPFER, H. . . . .	317	WILSON BROS. BOBBIN Co., LTD. .	381
LANCASTER & TONGE . . . . .	343	WILSON, S. B. & Co. . . . .	297
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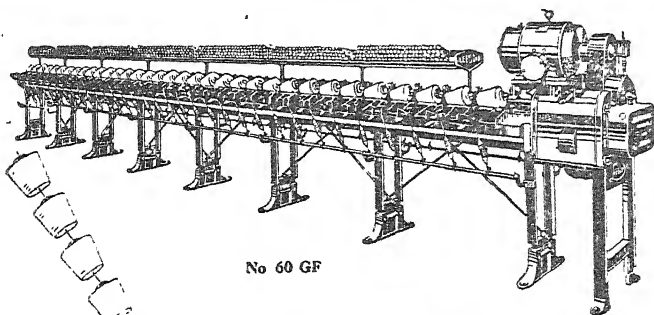
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# CONTENTS

---

	PAGE
OBITUARY, SIR CHARLES W. MACARA .. .. .	241
STATE OF TRADE REPORTS .. .. .	242-257
AUSTRIA, 242, BELGIUM, 245, BRAZIL, 245, CHINA, 247, ENGLAND, 248, ESTHONIA, 248, FRANCE, 249, GERMANY, 251, HUNGARY, 253, ITALY, 254, PORTUGAL, 257, U.S.A., 257, SWITZERLAND, 305	
HOW MASS PRODUCTION IS INTRODUCED INTO THE COTTON MILL INDUSTRY OF U.S.A., BY ARNO S. PEARSE .. .. .	258-263
AUTOMATIC LOOM ENQUIRY .. .. .	263
COTTON GROWING IN NEW COUNTRIES .. .. .	265-271
World's COTTON ACREAGE, 265; ALGERIA, 266, CHINA, 266, MEXICO, 266; RUSSIA, 267, ST. VINCENT, 267; SPAIN, 267, UGANDA, 267, World's ACREAGE AND PRODUCTION, 268-271.	
AMERICAN COTTON .. .. .	273-307
PRELIMINARY FINAL CROP FORECAST, 273, CROP REPORT DATES IN 1929, 274; GINNINGS PER DECEMBER 12, 277, SOUTHERN DELIVERY AND NEW YORK, 278; ESTIMATED CONSUMPTION OF AMERICAN COTTON, 281; AVERAGE WEIGHTS AMERICAN BALES, 282, INFLUENCE OF MOISTURE AND TEMPERATURE ON ROOT ROT, 285, NEW ORLEANS 50-BALE CONTRACT POSTPONED, 285; COTTON GRADE AND STAPLE REPORT, 286, RELATION OF FARM PRICES TO QUALITY OF COTTON, 288, U.S.A. COTTON CONSUMED, 289; BUREAU REPORT ON COTTON PRODUCTION AND DISTRIBUTION, 289, RETROSPECT OF 1928 CROP, 290-305; MARKET REPORTS, 305, WEEKLY COTTON EXPORTS, 306; MOISTURE IN AMERICAN COTTON, 307; ACREAGE, 1929, 309; STAPLE AND GRADE REPORT, 306.	
EGYPTIAN COTTON .. .. .	308-321
JOINT EGYPTIAN COTTON COMMITTEE, 308; COTTON DEVELOPMENT IN UPPER EGYPT, 309; ACTIVITIES COTTON RESEARCH BOARD, 309; MIXING OF DIFFERENT VARIETIES OF COTTON IN EGYPT, 313; EGYPTIAN COTTON CROP ESTIMATE, 316; EGYPTIAN COTTON CON- SUMED IN U.S.A., 316, RUSSIA BUYS EGYPTIAN COTTON, 316; MARKET REPORT, 319.	
EAST INDIAN COTTON .. .. .	322-326
THIRD COTTON CROP FORECAST, 1928-29, 322; INDIAN MILLS CONSUMPTION, 324, RALLI BROTHERS' ESTIMATE, 324; EXPORTS OF INDIAN COTTON TO EUROPE, 326.	

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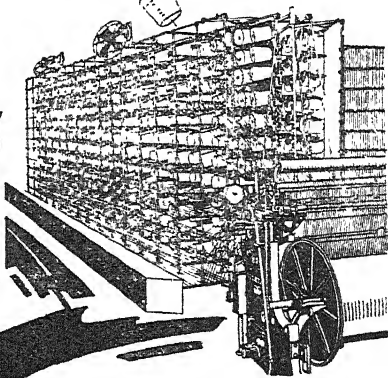
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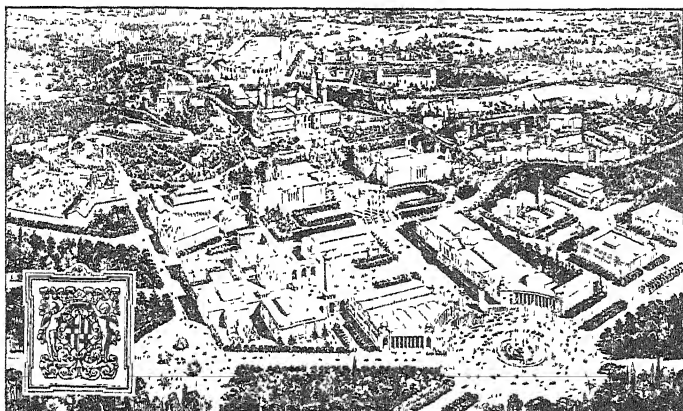
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	PAGE
TECHNICAL SECTION .. .. .	..329-335
CAUSES OF BAD WEAVING, 329-333, FABRICS TESTER, 333; LONG DRAFFS, 333, LOOMS PER TACKLER IN U.S.A, 334; SCORCHING TEMPERATURES OF TEXTILES, 334.	
COTTON MILL NOTES .. .. .	..337-360
FRENCH COTTON INDUSTRY, 337-342, PROBLEMS OF THE U.S.A. COTTON INDUSTRY IN NEW ENGLAND, 345, U.S.A. AND THE 48-HOUR WEEK, 347; AVERAGE EARNINGS IN U.S. COTTON INDUSTRY, 348; INDIA'S COTTON TRADE, 349-359, POLAND: A TEXTILE SYNDI- CATE, 359, RUSSIA, 360.	
MISCELLANEOUS .. .. .	..361-365
STATUTES OF THE INTERNATIONAL COTTON FEDERATION, 361; ARTIFICIAL COTTON, 365	
COTTON TRADE STATISTICS .. .. .	..367-377
ENGLAND, COTTON YARN AND CLOTH EXPORTS, 1928, 367-369; INDIAN YARN AND CLOTH MANUFACTURED SIX MONTHS ENDED SEPTEMBER, 1928, 370; JAPAN: YARN PRODUCED, EXPORTS, IM- PORTS COTTON, CLOTH ETC., HALF-YEAR JULY, 1928, 3723-77.	
REVIEWS ON CURRENT COTTON LITERATURE .. .. .	..379-380



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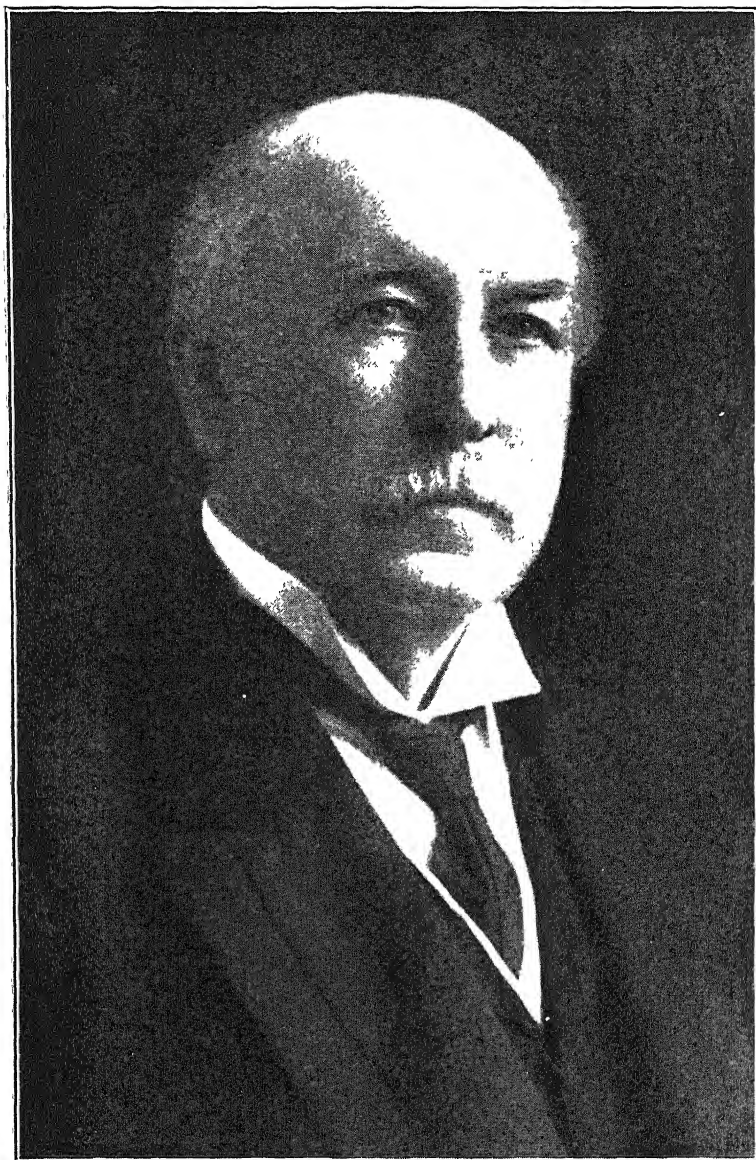
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*Lafayette*

SIR CHARLES W. MACARA, BART., J.P.

First President of the International Cotton Federation, which position he occupied for eleven years, from 1904 to 1915.

Born 11th January, 1845.

Died 2nd January, 1929.

# INTERNATIONAL COTTON BULLETIN

No. 26. Vol. VII, 2.

January, 1929

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It is with deep regret we have to announce the death of

**SIR CHARLES W. MACARA, BART.,**

which took place on the 2nd January, at his residence, Friar's Croft, Hale, Cheshire, England, at the age of 83.

Sir Charles was the first President of the International Cotton Federation, which position he occupied for eleven years, from 1904 to 1915. His devotion to the office can best be demonstrated by the fact that during the whole of that period he attended every meeting of the Committee and also every Congress which was held, and the services he rendered were recognized by all countries affiliated with the International Cotton Federation.

Among the list of honours conferred upon him by reason of the services performed by him on behalf of the world's cotton industry are the following:—

Created Baronet, 1911.

Chevalier de la Légion d'Honneur (France).

Chevalier de l'Ordre de Léopold (Belgium).

Gran Cruz del Merito Agrícola (Spain).

Order of the Red Eagle (Germany).

Commander of the Order of the Crown of Italy.

He was conscientious in all that he undertook and was a man of exceptional ability, as his books on all phases of commercial and industrial subjects testify.



---

## REPORTS FROM ASSOCIATIONS.

---

### AUSTRIA.

#### COTTON SPINNING SECTION.

Trade in the Austrian cotton-spinning industry has turned out unfavourable during the past year. This applies above all to the price level which has proved quite unsatisfactory both in the home market and export trade and did not suffice to cover the properly calculated costs of production. This state of things is in direct contradiction with the relatively large output of the mills which, on an average, are provided with orders for about three months. If notwithstanding this the earnings of the mills have been really poor, this is due to the keen competition in the home and foreign markets having prevented the manufacturers from securing profitable prices.

The official statistics of foreign trade show that during the first six months of 1928 the imports of cotton yarn exceeded those of the corresponding period of 1927 by no less than 26 per cent. This increase in the imports applies especially to the raw yarns from the following countries: Germany, Italy, Czecho-Slovakia, Switzerland and England.

On the other hand, the Austrian exports of cotton yarns decreased by about 12 per cent. during the same period, viz: from 73,658 quintals in 1927 to 65,239 quintals in 1928; this decrease is due above all to the German market, which has taken about 50 per cent. less than in the previous year, and then to Hungary, whose takings also fell by about 50 per cent. Against this a slight increase in sales to Czecho-Slovakia and Roumania can be recorded. The business prospects of the Austrian cotton-spinning industry are very uncertain for the near future, the more so as it is very doubtful whether the industry will succeed in making up for the deficiency in the export trade to Germany and Hungary. It is only through improvements in the production of cloths that we can expect a healthier tone. In spite of the unfavourable conditions mentioned, an extensive stoppage of work has not yet taken place; however, at present two spinning mills with a total spindlease of 40,000 have been closed down.

#### COTTON WEAVING.

In a general way we can also say that trade has been unsatisfactory in the cloth business, because the quotations, especially for the standard grey cloths, were throughout very unsatisfactory on account of the continuous price cutting on the part of foreign

competitors. Margins have also fallen for fancy coloured cloths. Certainly the amount of work available has been less than in previous years, which is all the more striking in view of the fact that the capacity of the home mills is not sufficient to cover the requirements of the home trade in all qualities. The present stoppage of two weaving mills is an eloquent proof of this state of affairs. The principal cause of these abnormal conditions must be attributed to the fact that the Austrian market is still an outlet for the surplus of woven cloths available in the neighbouring countries, and this in spite of the moderate change in the customs tariff brought about in 1927.

In accordance with the official statistics, a total of 55,994 quintals of woven cotton cloth was imported in the first six months of the year 1928 against 51,548 quintals in the same period of the preceding year. The greater part of this increase in imports applies to grey and fancy coloured woven cloths, whereas a slight decrease has taken place in the other types. Among the countries from which these goods were imported figures in the first place Czecho-Slovakia, then Switzerland, England and Germany.

Against this the exports of Austrian cotton cloths were not important, amounting in all to only 18,784 quintals for the first half of 1928 against 20,064 quintals for the preceding half year. It will be seen that against the increased imports a fall in exports has to be recorded, and the contraction of business is due to this circumstance. The prospects of the Austrian weaving industry are therefore dependent upon measures for hindering the disproportionately large imports arising largely from clearances of stock lines and other considerations of a financial nature. These have led to cut prices against which the protection given by the customs tariff is ineffective. Reductions in the number of hours worked were made at first only to a moderate extent but, on the other hand, the installation of new weaving looms which had been progressing well could be continued only in a considerably reduced degree.

*(Association of Austrian Master Cotton Spinners and Weavers.)*

---

*The original report follows:—*

#### BAUMWOLLSPINNEREI.

Die Geschäftsverhältnisse der österreichischen Baumwollspinnerei haben sich während des abgelaufenen Jahres ungünstig gestaltet. Dies gilt vor Allem für die Preisbildung, welche sowohl im Inlands- wie im Exportgeschäft eine vollständig unbefriedigende ist, und eine Deckung der ordnungsmässig kalkulierten Erzeugungskosten nicht gestattet. Diese Tatsache steht im Widerspruch zu dem verhältnismässig günstigen Beschäftigungsstand der Betriebe, welche für durchschnittlich 3 Monate mit Aufträgen versorgt sind. Wenn die Betriebsverhältnisse trotzdem ausgesprochen schlechte sind, so findet dies seine Erklärung in dem Umstande, dass der scharfe Konkurrenzkampf auf den heimischen und auf den Auslandsmärkten die Erzielung von angemessenen Verkaufspreisen verhindert. Die amtliche Aussenhandelsstatistik für das 1. Semester 1928 zeigt, dass die Einfuhr von Baumwollgarnen gegenüber der gleichen Periode des Vorjahres um nicht weniger als 26% gestiegen ist. Dieser

Mehrimport betrifft in der Hauptsache die rohen Garne und die folgenden Provenienzen: Deutschland, Italien, Tschechoslowakei, Schweiz und England. Dem gegenüber ist die Ausfuhr österreichischer Baumwollgarne in dem genannten Zeitraume von 73,658 q. im Jahre 1927 auf 65,239 q. im laufenden Jahr, demnach um rund 12 % zurückgegangen. Dieser Ausfall betrifft in erster Reihe den deutschen Markt, welcher um rund 50 % weniger aufgenommen hat als im Vorjahr, ferner Ungarn, dessen Abnahme ebenfalls um nahezu 50 % zurückgegangen ist. Demgegenüber ist eine mässige Absatzsteigerung in Rumanien und der Tschechoslowakei erzielt worden. Die geschäftlichen Aussichten der österreichischen Baumwollspinnerei sind für die nächste Zukunft durchaus unsicher, zumal es wenig wahrscheinlich ist, dass es gelingen konnte, den Absatzausfall in den vorgenannten Ländern wieder auszugleichen. Eine Sanierung der österreichischen Spinnindustrie kann nur im Wege einer Steigerung der Gewebeerzeugung erwartet werden. Zu einer weitgreifenden Betriebseinschränkung ist es infolge der nicht ungünstigen Beschäftigungsverhältnisse zwar nicht gekommen, doch sind immerhin zwei Spinneriebetriebe mit zusammen cca. 40,000 Spindeln, stillgelegt worden.

#### BAUMWOLLWEBEREI.

Auch das Web-warengeschäft hat sich im Grossen und Ganzen ungünstig entwickelt, weil die Preisbildung, namentlich in den massgebenden Rohwarenartikeln, infolge der fortgesetzten Unterbietungen durch die ausländische Konkurrenz, eine durchaus unbefriedigende ist. Aber auch in den buntgewebten Waren hat sich die Kalkulation verschlechtert. Die Beschäftigungslage ist jedenfalls weniger günstig als in den abgelaufenen Jahren, was um so auffallender ist als die Kapazität der heimischen Weberei noch nicht ausreicht, um den Bedarf des Inlandes in allen Qualitäten zu decken. Die im Zuge befindliche Stilllegung von 2 Webereien ist für die gegebene Sachlage jedenfalls bezeichnend. Die wichtigste Ursache dieser abnormalen Entwicklung liegt in dem Umstande, dass der österreichische Markt, ungeachtet der bescheidenen Zollregelung, die im Jahre 1927 durchgeführt wurde, noch immer als Aufnahmgebiet für die überschüssige Webwarenproduktion der benachbarten Staaten in Anspruch genommen wird. Nach der amtlichen Handelsstatistik wurden im 1. Semester 1928 insgesamt 55,994 q. Baumwollgewebe gegenüber 51,548 q. in der gleichen Zeit des Vorjahres eingeführt. Der Hauptanteil an dieser Mehreinfuhr entfällt auf die rohen und bunten Gewebe, während in den anderen Sorten ein kleiner Rückgang zu verzeichnen ist. Von Einfuhrländern kommt in erster Linie die Tschechoslowakei in Betracht, dann die Schweiz, England und Deutschland. Demgegenüber ist die Ausfuhr von österreichischen Baumwollgeweben als unbedeutend zu bezeichnen und hat im ersten Semester des Jahres 1928 insgesamt 18,784 q. gegenüber 20,064 q. des vorausgegangenen Jahres betragen. Demnach steht der Mehreinfuhr ein verringerter Export gegenüber, woraus sich die schon erwähnte Verschlechterung des Geschäftsganges ergeben musste. Die Aussichten der österreichischen Webwarenindustrie sind nach wie vor abhängig von einer Eindämmung der unverhältnismässig starken Einfuhr, die zum grossen Teile auf Lagerabstossungen

und anderen Finanztransaktionen beruht und sich daher zu Tiefpreisen vollzieht, gegen welche der bestehende Zollschatz wirkungslos ist. Arbeitszeiteinschränkungen wurden in der Weberei vorerst nur im bescheidenen Ausmasse durchgeführt, doch konnte die im Zuge gewesene Zustellung von Webstühlen, infolge der geschilderten Verhältnisse, nur in einem wesentlich verringerten Umfange fortgesetzt werden.

*Verein der Baumwollspinner und Weber Oesterreichs.*

## BELGIUM.

During the last quarter the index of the cost of living has risen, which, as a consequence, has brought the concession of further increases in wages.

An increase of 5 per cent. took place on the 15th October, and a second increase of 5 per cent. on the 15th December, 1928. The basis of salaries of March, 1923, has now actually been increased to 115 per cent.

The present situation is shown, above all, by the extremely low prices of sales, and at present business is no better in the weaving than in the spinning industry. As a rule, the spinning mills are not working short time; they prefer to accept orders at poor prices rather than to reduce their production. There is no organized short time being worked in the weaving section, but several weaving firms have some looms stopped.

---

### *The original report in French follows:—*

Durant le dernier trimestre l'index du cout de la vie s'est relevé ce qui a eu pour conséquence l'octroi de nouvelles majorations de salaires.

Une augmentation de 5 pour cent a été appliquée le 15 octobre et une seconde augmentation de 5 pour cent le 15 décembre 1928. Les salaires de base de mars 1923 sont actuellement majorés de 115 pour cent.

La situation actuelle se caractérise surtout par des prix de vente extrêmement bas et à ce point de vue les affaires ne sont pas plus brillantes en tissage qu'en filature. En règle générale la filature ne chôme guère; les filateurs préfèrent accepter de mauvais prix que de réduire leur production. Dans le tissage il n'y a pas de chômage organisé mais dans plusieurs usines des métiers sont arrêtés.

*Société Co-operative "La Textile."*

## BRAZIL.

A report entitled "A Crise Textil," recently issued by the Centro dos Industriaes de Fiação e Tecclagem de São Paulo (Master Cotton Spinners and Weavers' Association of São Paulo) gives the statistics relating to raw-cotton production and cotton manufacturing up to the end of 1927.

The production of raw cotton and of cotton goods is given in the following tables:—

## COTTON PRODUCTION.

Year	Area cultivated Hectares	Production of cotton Kilos	Number of bales of 225 Kilos each
1920-1921 .. .	383,468 ..	103,263,200 ...	458,947
1921-1922 .. .	479,360 ...	109,294,287 ..	485,752
1922-1923 .. .	611,948 ...	119,899,190 ..	532,885
1923-1924 .. .	627,512 ...	124,875,000 ...	555,000
1924-1925 .. .	636,808 ..	171,981,200 ..	764,360
1925-1926 .. .	534,357 ..	130,421,100 ...	579,649
1926-1927 .. .	441,341 ..	111,097,194 ..	493,765
1927-1928* .. .	490,776 ..	106,600,930 ..	473,780

\* Estimate.

## PRODUCTION OF COTTON TEXTILES IN 1927.

State	Production in Metres	Value of Production	Cotton consumed Kilos
Alagoas ..	28,129,430	36,675 : 506\$420	3,985,778
Bahia ...	34,979,889	34,946 : 245\$000	4,389,750
Ceará .. ..	5,285,141	12,376 : 630\$650	1,686,027
Distrito Federal ..	111,645,334	153,812 : 160\$200	14,727,322
Espirito Santo ..	3,916,676	4,328 : 000\$000	480,421
Maranhão .. .	15,920,960	16,032 : 407\$048	2,298,105
Minas Geraes ..	72,467,283	98,222 : 269\$060	9,395,751
Paraná ... ..	240,000	2,600 : 000\$000	20,000
Parahyba do Norte ..	14,800,000	12,768 : 740\$000	1,462,000
Pernambuco .. .	64,986,420	63,300 : 000\$000	6,551,409
Piahy .. ..	342,902	443 : 386\$518	104,136
Rio de Janeiro ...	69,275,503	76,149 : 375\$200	9,198,588
Rio Grande do Norte	2,700,000	2,700 : 000\$000	430,000
Rio Grande de Sul ...	6,156,950	14,975 : 000\$000	1,400,000
Santa Catharina ..	4,325,249	14,043 : 091\$650	957,926
Sergipe ... ..	30,292,746	25,074 : 452\$920	3,574,385
São Paulo ... ..	229,599,343	409,447 : 524\$800	45,225,404
Total ... ..	<u>695,063,826</u>		<u>105,887,002</u>

It will be seen from these figures that during 1926-27 São Paulo consumed 45,225,000 kilos of raw cotton, though it should be mentioned São Paulo only grew a little over 10,000,000 kilos of this quantity. It was necessary to import the difference of 35,000,000 kilos from North Brazil, on which freight expenses amount to about 10\$000 per arroba (15 kilos). The duties on imported foreign cotton are so heavy that they practically prohibit its importation. The Southern Brazilian mills are therefore entirely dependent on cotton imported from the North, and as the supply is barely sufficient to cover the demand the spinner is forced to pay a high price.

These are considered to be the main causes of the depression of the cotton textile industry. It would seem that an increase in tariffs on imports of cotton goods would not be of such avail as encouraging the production of Brazilian cotton, and cheapening transport charges.

The report estimates the consumption of cotton textiles in Brazil on a *per capita* estimate—10 metres is the *per capita* estimate for 16,839,919 inhabitants in hotter northern regions and 25 metres *per capita* for 20,031,053 in the southern and more temperate zones

—giving a total consumption of 669,175,515 metres. Against this calculated consumption supplies were:—

Brazilian production	...	...	...	...	695,063,826	Metres
Imports (7,246 tons at 70 grammes to the metre)	...	...	...	...	103,510,000	„
					<u>798,573,826</u>	„

The report states that at present, due to the overproduction of the mills, there is stock on hand at the mills of at least 250,000,000 metres of cotton goods.

The suggested remedies for improving conditions in the São Paulo cotton industry are briefly as follows:—

#### RAW MATERIAL.

- (1) Government assistance to develop cotton growing.
- (2) Government assistance in making available a sufficient supply of insecticide.
- (3) A revision of all the ginning machines in the State.
- (4) Revision of the railway charges for transport.
- (5) An appeal to rural authorities to co-operate with the public authorities to influence planters to take up cotton growing.
- (6) The adoption of measures to impede the exportation of the staple until such time as local consumption shall meet local needs. In this connection manufacturers should be called upon to guarantee to purchase locally produced cotton at prices equal to those ruling in Liverpool.

#### TO PROTECT NATIONAL TEXTILES.

- (1) Revision of duties on imported yarns and textiles.
- (2) Prohibition, during a period of five years, of imports of all textile machinery or parts of machines which could form complete machines (spinning and weaving machinery).
- (3) Revision of the import duties on imported machinery and accessories.
- (4) Rigorous fiscalization at the ports and the frontier to prevent smuggling.
- (5) Adoption of immediate measures to permit the distribution of the existing stocks. In this connection it is suggested that the Government advance loans on stocks of textiles and that an institute be created for the purpose of establishing minimum prices for cotton produced in São Paulo.

#### CHINA.

Chinese cotton mills have had a six months period of unusually profitable operations, the best in a number of years. The interior has been buying cotton goods heavily, stocks continue very small, demand is good for yarn at prices profitable in relation to price of raw cotton, and mills have been operating at capacity.—(*Foreign Crops and Markets.*)

**ENGLAND.****SPINNING SECTION.**

During the autumn spinners in the American section experienced a broadening of demand, although prices left much to be desired. Unfortunately the improvement was not long-lived, and by the end of December matters were much the same as they had been during the major part of the year, production falling short of full capacity to the extent of over 25 per cent.

In the Egyptian section full-time working, generally speaking, was in operation. The margin between cotton and yarn, however, had diminished during the quarter.

The representations made by the Federation to the Operative Spinners' Amalgamation having failed to secure a reorganization of cleaning and oiling, so as to effect a saving on the present amount of time allowed for the work, notice was given by the Federation to terminate existing cleaning and oiling agreements from the 2nd February, 1929.

*Federation of Master Cotton Spinners' Associations, Ltd.*

**WEAVING SECTION.**

The position in the manufacturing section is still unsatisfactory. The volume of orders is not sufficient to cause more looms to be started up, and whilst the industry keeps about the same level as during the last quarter with regard to the number of looms running, the orders being booked do not show a satisfactory margin.

*Cotton Spinners and Manufacturers' Association.*

**ESTHONIA.**

Both the wholesale and the retail trade have not attained the desired activity during the last quarter of 1928, following smaller crops than in the preceding year. Abnormal rains, continuing until the end of the year, and the absence of frost made the road conditions in the country unfavourable, retarding work in the forests, etc., which, as a result, checked business activity.

There has been no alteration in the working hours of the textile mills of Esthonia during the period under review.

Business is assured for about two months by orders on hand. Wages have remained unchanged.

**EXPORTS.**

We are able to give the following official export figures for Esthonia:—

**EXPORTS OF COTTON GOODS FROM ESTHONIA IN TONS.**

				September, 1928	October, 1928
Country.				Tons.	Tons.
England	...	...	..	39	42
Lithuania	...	...	..	47	12
Latvia	...	...	...	90	70
Sweden	...	...	..	30	49
Germany	...	..	...	104	94
Finland	..	...	...	11	34
Denmark	...	...	...	168	175
Norway	...	...	...	36	14
Others	...	..	..	7	2
				532	492
Total value				1,650,000	1,560,000
				(Esthonian crowns).	(Esthonian crowns).

*The original article in German follows:—*

Der Engros- als auch Detailhandel haben sich leider während der letzten drei Monate nicht in gewünschtem Masse belebt, als Folge eines Ernteertrages, welcher gegen das Vorjahr abfällt. — Fortlaufend anormal feuchte, bis zum Jahresende frostlose Witterung haben die Wegeverhältnisse auf dem Lande zudem ungünstig beeinflusst, den Beginn der Waldarbeiten hinausgeschoben, etc., was auch hemmend auf die Belebung des Handels gewirkt hat.

In den Textilfabriken Estlands ist in der Arbeitszeit gegen die letzte Berichtsperiode keine Veränderung eingetreten.

Die Beschäftigungsmöglichkeiten sind durch vorliegende Orders für ca. 2 Monate hinaus gesichert.

Die Lohnverhältnisse sind unverändert geblieben

#### OFFIZIELLE DATEN UEBER DEN EXPORT ESTLANDS IN TEXTILWAREN.

Wir sind in der Lage die nachstehenden, bis hierzu vom offiziellen statistischen Zentralbüro verarbeiteten Daten zu geben: —

Es sind an Textilerzeugnissen exportiert worden im September im Summa 532 tons, wobei als Haupt-Bestimmungsländer England mit 39 t., Litauen mit 47 t., Lettland mit 90 t., Schweden mit 30 t., Deutschland mit 104 t., Finnland mit 11 t., Danemark mit 168 t. und Norwegen mit 36 t. in Frage kommen, was in Eesti-Kronen ausgerechnet im ganzen ca. 1,650,000 ausmacht.

Es sind an Textilerzeugnissen exportiert worden im Oktober im Summa 492 tons, wobei als Haupt-Bestimmungsländer England mit 42 t., Litauen mit 12 t., Lettland mit 70 t., Schweden mit 49 t., Deutschland mit 94 t., Finnland mit 34 t., Danemark mit 175 t. und Norwegen mit 14 t. in Frage kommen, was in Eesti-Kronen ausgerechnet im ganzen ca. 1,560,000 ausmacht.

## FRANCE.

### GENERAL SITUATION.

The situation of the French cotton industry, especially in the spinning section, continued in a precarious condition during the last quarter of 1928, with alternating slight revivals and new depressions.

There has been no appreciable change in the quantities of stocks, which are considerable in dyed goods, although fewer in other goods. Mills are estimated to have work on hand for about three months, varying considerably for the different qualities.

As regards prices, these still continue to be poor, notably in the American section, for near deliveries.

### WAGES.

Towards the end of the last quarter of 1928, in Normandy, an increase in wages to the extent of 4 per cent. of the basic price and representing 3 per cent. of the preceding wages has been granted. Some slight alterations have also taken place in Alsace. It should be mentioned also that a few local strikes in Normandy and in the Department of Nord have taken place. These were, however, soon terminated.

## STATE OF TRADE REPORTS

The imports and exports are as follows:—

IMPORTS				1928	1928
				2nd quarter	3rd quarter
(a) Cotton Yarns	.	..	.	6,122	6,668
(b) Cotton Cloths	..	.	..	2,779	4,238

EXPORTS				2nd quarter	3rd quarter
(a) Cotton Yarns—total exports	..			61,405	47,427

## PRINCIPAL COUNTRIES OF DESTINATION.

Algeria, French Colonies and Protectorates	..			2,909	3,177
Germany	..	..	..	24,512	20,545
Belgium—Luxembourg	..	..		9,059	7,618
Holland	..	..	..	8,856	3,917
Switzerland	..	..	..	4,318	3,558
Poland	..	..	..	1,070	1,023
Argentine	..	..	..	1,499	1,494

(b) Cotton Cloths—total exports				176,221	171,520
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## PRINCIPAL COUNTRIES OF DESTINATION

Algeria, French Colonies and Protectorates	.			84,822	92,630
Germany	..	.	.	19,193	10,132
England	..	..	.	9,565	8,856
Switzerland	..	..	..	15,251	10,963
Belgium—Luxembourg	.	..		9,202	8,706
Argentine	..	.	.	4,609	5,142
United States	.	..	..	2,508	1,294
Greece	..	..	..	1,818	1,696

---

*The following is the original in French:—*

## SITUATION GÉNÉRALE.

La situation de l'industrie cotonnière française, surtout en filature, a continué à être précaire pendant le dernier trimestre de 1928, avec des alternatives de légères reprises et de dépressions nouvelles.

On ne constate pas de modifications sensibles dans les stocks qui sont considérables pour les articles de couleur, et d'importance moindre pour les autres genres. Les engagements peuvent être estimés à 3 mois environ; ils sont assez inégalement répartis suivant les sortes.

Quant aux prix, ils sont toujours franchement mauvais, notamment en ce qui concerne la section Filature Amérique, pour les livraisons rapprochées.

## SITUATION OUVRIÈRE.

Au cours du dernier trimestre 1928, il a été accordé en Normandie une augmentation de salaires de 4 pour cent du taux de base représentant environ 3 pour cent des salaires précédemment payés. Des rajustements partiels ont également eu lieu en Alsace. Il y a lieu de signaler quelques grèves locales en Normandie et dans le Nord; elles se sont d'ailleurs assez rapidement terminées.

## COMMERCE EXTÉRIEUR.

I.—IMPORTATIONS				1928	1928
				2ème trimestre	3ème trimestre
(a)	Fils de coton	..	..	6,122	6,668
(b)	Tissus de coton	..	..	2,779	4,238
II.—EXPORTATIONS					
(a)	Fils de coton : Exportations totales			61,405	47,427
PRINCIPAUX PAYS DE DESTINATION :					
	Algérie, Colonies françaises et pays de protectorat	..	..	2,909	3,177
	Allemagne	..	..	24,512	20,545
	Union Economique Belgo-Luxembourgeoise	..	..	9,059	7,618
	Pays-Bas	..	..	8,856	3,917
	Suisse	..	..	4,318	3,558
	Pologne	..	..	1,070	1,023
	République Argentine	..	..	1,499	1,494
(b)	Tissus de coton : Exportations totales	..	..	176,221	171,520
PRINCIPAUX PAYS DE DESTINATION :					
	Algérie, Colonies françaises et pays de protectorat	..	..	84,822	92,630
	Allemagne	..	..	19,193	10,132
	Angleterre	..	..	9,565	8,856
	Suisse	..	..	15,251	10,963
	Union Economique Belgo-Luxembourgeoise	..	..	9,202	8,706
	République Argentine	..	..	4,562	5,039
	Etats-Unis	..	..	4,609	5,142
	Pays-Bas	..	..	2,508	1,294
	Grèce	..	..	1,818	1,696

## GERMANY.

## WEAVING SECTION.

The check in consumption was practically unaltered during the last three months of 1928. At first the Christmas trade caused a passing although a short improvement, which, by reason of the large available stocks of finished goods, made no improvement on prices. Cloth prices, on the contrary, were reduced further, in spite of a rise in the raw cotton market. As stocks in the hands of consumers have decreased, a better enquiry is hoped for in the near future. There is, however, no actual prospect in view that a substantial improvement in business will take place. The amount of orders on hand must be defined as unimportant, and will occupy the mills for two months only. Almost general short time, averaging 15 to 20 per cent. of normal production, is being worked.

*(Association of South German Master Cotton Manufacturers.)*

*The original report follows:—*

Die Zurückhaltung des Konsums hielt auch in den 3 letzten Monaten des Jahres 1928 fast unverändert an. Erst das Weihnachtsgeschäft brachte eine vorübergehende, aber kurze Besserung, die jedoch wegen der grossen vorhandenen Lager in Fertigwaren auf die Preise keine Auswirkung hatte. Tücherpreise sind im Gegenteil weiter zurückgegangen, obwohl der Baumwoll-

markt angezogen hat. Da die Lager bei den Abnehmern sich vermindert haben, so besteht die Hoffnung, dass für die nächste Zeit, wenn auch keine grossere, so doch standigere Nachfrage zu erwarten sein dürfte. Es ist aber keine Aussicht vorhanden, dass eine wesentliche Belebung des Geschäftes eintreten wird. Der vorhandene Auftragsbestand muss als gering bezeichnet werden und gibt den Werken nur für etwa 2 Monate Beschäftigung. Die nahezu allgemeinen Betriebseinschränkungen, die im Durchschnitt 15-20% einer normalen Produktion betragen, dauern fort.

(*Verein Sudddeutscher Baumwollindustrieller.*)

#### SPINNING SECTION.

During the last three months of the past year no improvement has taken place in the business situation of the German cotton-spinning industry. The short time which had been previously put into operation was for this reason kept in force. Under these conditions, and owing to the steadiness of the cotton market, it was not expected that there would be any increased demand. Sales of yarns are mostly only made for quick delivery, chiefly from mill stocks, whereas distant deliveries can only be made in very large orders. The prices obtained have been exceptionally low and did not cover the cost of production. In spite of these low prices the foreign deliveries were able to under-sell on our market.

It is to be regretted that there is no indication that the present organized short time may be discontinued.

The German foreign trade in cotton yarns during the months January to November, 1928, is given in the original German report which follows:—

Auch in den letzten 3 Monaten des abgelaufenen Jahres ist eine Besserung in der Geschäftslage der deutschen Baumwollspinnerei nicht eingetreten. Die bestehenden Betriebseinschränkungen mussten deshalb durchweg in dem bisherigen Umfange aufrecht erhalten bleiben. An dieser Gesamtlage vermochte auch eine gelegentliche, durch die feste Haltung der Baumwollmärkte angeregte Nachfrage nichts zu ändern. Bei den getätigten Garnverkäufen handelte es sich meist um kurzfristige Lieferungen, vielfach auch um den Verkauf von Lagerware, während langfristige Verträge nur in ganz unzureichendem Masse abgeschlossen werden konnten.

Die Preise waren nach wie vor ausserordentlich gedrückt und deckten nicht die Gestehungskosten. Trotz der niedrigen Preise blieben die ausländischen Garnlieferanten mit starken Untergeboten am Markt.

Es sind leider keine Anzeichen vorhanden, dass die allseits bestehenden Betriebseinschränkungen in absehbarer Zeit aufgehoben werden können.

Ueber den deutschen Aussenhandel in Baumwollgarnen während der Monate Januar bis einschliesslich November 1928 gibt die beiliegende Aufstellung, die auf amtlichen Ziffern beruht, Auskunft.

*Es wurden nach Deutschland eingeführt (in dz.) (Doppelzentner)*

(Imports to Germany)

Januar	...	...	...	...	...	59,916
Februar	...	...	...	...	...	52,861
März	...	...	...	...	...	47,223
April	...	...	...	...	...	45,233
Mai	...	...	...	...	...	39,743
Juni	...	...	...	...	...	26,526

Juli	33,604
August	31,792
September	32,870
Oktober	35,257
November	36,463

*Es wurden aus Deutschland ausgeführt (in dz.) (Doppelzentner)*  
(Exports from Germany)

Januar	6,008
Februar	5,802
März	6,174
April	6,302
Mai	7,560
Juni	7,893
Juli	7,657
August	9,215
September	6,990
Oktober	7,815
November	6,588

1 Doppelzentner equals 100 kilos.

*Arbeitsausschuss der Deutschen Baumwollspinnerverbande.*

## HUNGARY.

The business situation of the Hungarian cotton industry continues to be unsatisfactory. Spinners are working full time, but only at low prices, owing to very cheap foreign offers. Weavers are working about 80 per cent. of full time and therefore have not many orders on hand.

In the knitting and weaving industry the prices are very poor owing to the overproduction of the domestic mills. During recent times still larger quantities of so-called fine cotton stockings have been manufactured in this country.

The exports of cotton goods during the nine months, January to September, 1928, were as follows:—

Grey cloths	1,114	quintals
Bleached cloths	388	„
Dyed cloths	512	„
Printed cloths	8,803	„
Woven coloured cloths	912	„
Total	11,729	„

The chief countries exported to were as follows:—

Grey cloths :									
Germany ..	.	.	.	.	.	.	.	867	quintals
Czecho-Slovakia ..	.	.	.	.	.	.	.	189	„
Bleached cloths									
Rumania ..	.	.	.	.	.	.	.	299	„
Dyed cloths									
Rumania ..	.	.	.	.	.	.	.	205	„
Yugoslavia ..	.	.	.	.	.	.	.	127	„
Prints and woven coloured cloths :									
Rumania ..	.	.	.	.	.	.	.	2,309	„
Yugoslavia ..	.	.	.	.	.	.	.	2,108	„
Germany ..	.	.	.	.	.	.	.	456	„
England ..	.	.	.	.	.	.	.	465	„
Egypt ..	.	.	.	.	.	.	.	1,887	„

(NOTE.—The total exports for the first nine months of 1927 were 8,700 quintals.—ED.)

*The following is the original report in German:—*

Die Geschäftslage der ungarischen Baumwollindustrie ist andauernd unbefriedigend. Die Spinnereien arbeiten mit vollem Betrieb aber infolge der sehr billigen Auslandsofferte zu gedrückten Preisen, die Webereien halten einen cca 80%-igen Betrieb aufrecht,

In der Strick- und Wiskwarenindustrie sind die Preise infolge der Ueberproduktion der inländischen Betriebe gedrückt. In der letzten Zeit werden immer grossere Quantitäten von feinen sog. Cottonstrümpfen im Lande erzeugt.

Die Ausfuhr von Baumwollwaren gestaltete sich in den Monaten Januar bis September 1928 wie folgt:—

Rohc Baumwollgewebe	.. .. .	1,114 q.
Gebleichte Baumwollgewebe	.. .. .	388 q.
Gefarbte Baumwollgewebe	.. .. .	512 q.
Buntgedruckte Baumwollgewebe	.. .. .	8,803 q.
Buntgewebte Baumwollgewebe	.. .. .	912 q.

Grossere Posten sind ausgeführt worden:—

Rohc Baumwollgewebe:		
Nach Deutschland	.. .. .	867 q.
Nach der Tschechoslovakei	.. .. .	189 q.
Gebleichte Baumwollgewebe:		
Nach Rumänien	.. .. .	299 q.
Gefarbte Baumwollgewebe:		
Nach Rumänien	.. .. .	205 q.
Nach Jugoslawien	.. .. .	127 q.
Buntgedruckte und gewebte Baumwollgewebe		
Nach Rumänien	.. .. .	2,309 q.
Nach Jugoslawien	.. .. .	2,108 q.
Nach Deutschland	.. .. .	456 q.
Nach England	.. .. .	465 q.
Nach Aegypten	.. .. .	1,887 q.

*Magyar Textilgyárosok Országos Egyesülete.*

## ITALY.

The state of the Italian American cotton spinning section does not yet permit of selling with a sufficient margin, although the condition in Italy is better in general than that of the spinning industry of other countries. The same may be said of the Indian cotton spinning section. On the other hand, the Egyptian cotton spinning mills are better situated as regards both home and foreign sales. There is not as much competition in these yarns, and the demand has increased a little.

The percentage of activity in the spinning mills during the last two months has varied from about 91 to 92 per cent.

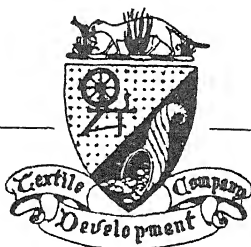
The export of cotton yarn to Northern European countries is effected without meeting with any great difficulties; the prices obtained for the goods exported to the Balkans are higher.

Our spinning mills are energetically introducing reforms for the purpose of reducing the cost of production and the beneficial results will not fail to make themselves felt.

Grey cloths are sold at very low prices. The mills producing bleached cloths and cloths dyed in the piece have, on the other hand, experienced increased sales and therefore increased work. It is still very difficult, however, to sell coloured and fancy materials; they feel very keenly the competition of the printed goods now in fashion.

Shirtings and velvets, especially printed, are articles of great and increasing demand.

On the whole, the dyers are busy, to a considerable extent due also to the reduction of the prices of their raw materials, with a consequent reduction of their working costs.



# A MILL SURVEY

*as made by*

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*SIDNEY S. PAINE, President*

**80, FEDERAL STREET  
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The percentage of activity in the weaving mills during the last two months varied between 85 and 86.5 per cent.

After the many unfortunate failures, the home market has improved in so far as the general quality of the clientele, so that we may hope that we shall not experience any more painful surprises. The elimination of the weaker elements by bankruptcies and adjustments cannot fail to have its effect, as, for instance, the establishment of more normal conditions of payment in dealing with the retailers.

Among the foreign countries, South America and the Balkans have shown greater activity by increased purchases.

In Egypt the good cotton harvest has produced contentment, thanks to the influence of a good cotton season on business in general.

Good enquiries have been received from Roumania and Transylvania. Only very little business is done with India and China. Business with Africa, and particularly with West Africa, has been more brisk in cheap goods.

There has also been an improvement in the enquiries received from our own colonies, though, of course, they remained within the modest economic importance of the colonies. Yet they have supplied a fair number of orders for our manufacturers, especially for the most current goods.

In conclusion, we may look into the future with some optimism, confirmed by the figures of our exports during the last few months. It must be added, however, that though these figures are satisfactory from the point of view of quantity, yet they are not yet satisfactory as regards the price.

The following table gives the export of yarn and of cloth during the last 10 months, compared with the corresponding periods of 1926 and 1927:—

January–October	1926	...	56,657,900 Kgs.
„	„	1927	60,848,900 „
„	„	1928	65,845,800 „

*Associazione Italiana Fascista degli Industriali Cotonieri.*

## PORTUGAL.

There has been no change in the business conditions in the cotton spinning and weaving industry in Portugal since last October. Short time is still being worked to the extent of 75 per cent. of normal.

## U.S.A.

According to the monthly report issued by the Association of Cotton Textile Merchants of New York the production of cotton cloth in December amounted to 279,000,000 yards, against 342,000,000 yards in November. The sales during the month were 225,000,000 yards, as compared with 375,000,000 yards in the previous month. Stock on hand at the end of December amounted to 392,000,000 yards, against 389,000,000 yards on November 30th, and the unfilled orders totalled 469,000,000 yards, against 520,000,000 yards at the end of the preceding month. (*The Manchester Guardian.*)

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## How Mass Production is Introduced into the Cotton Mill Industry of U.S.A.

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By ARNO S. PEARSE.

IN view of the wide interest taken in the Report on the U.S.A. Cotton Mill Industry, which appeared in the INTERNATIONAL COTTON BULLETIN No. 25, the following notes, which are the result of conversations with Mr. Sidney S. Paine, President of the Textile Development Co., Boston, Mass., may be of value. It is undoubtedly a fact that some mills have increased the machinery production and output per operative 100 per cent., or even more. Such results have been secured by surveying mills to determine all influences that govern a machine or job in order to do away with unnecessary work and needless difficulties. It should not be assumed that the extended labour programme means that operatives do more work; *they may actually perform less work while tending more machines and earning larger profits for their employers.*

### FROM 24 TO 88 LOOMS PER WEAVER.

A few illustrations that are typical of many mills will introduce the subject. To make the question less cumbersome I have given illustrations from weave rooms only. Labour arrangement has been studied with equal care in the other departments, although the savings possibly are generally not as large as in the weave rooms.

*Mill "A"—Print Cloths.*—The manufacturing cost was prohibitive. A survey was made, and several months were spent in a period of preparation. A year later the labour cost was 4½ per cent. lower. In the weave room the weavers earned about 12 per cent. more money (after the changes), and in spite of the fact that they ran 84 looms with the help of a battery hand, instead of 24 looms, said that they did not work as hard.

*Mill "B"—Print Cloths.*—The weavers ran from 24 to 28 looms. After the survey and period of preparation the weavers ran 80 to 88 looms (with a battery hand), earning about 10 per cent. more money, and had more rest time. (Incidentally a neighbouring mill attempted to change from 24 to 28 looms without a survey or period of preparation and failed.)

*Mill "C"—Coarse Goods.*—The weavers were running 20 looms, and the labour turnover was enormous, as the labour situation was very bad. After a survey and a year of preparation the weavers averaged 71 looms and the labour turnover was a small fraction of what it formerly was.

*Mill "D"—Fine Goods.*—The mill has had a survey, is now in a period of preparation, and by the same method used in the other mills expects to cut the labour cost over 4 cents per pound, and at the same time pay higher wages.

## SURVEY PREPARES WAY FOR CHANGES.

By a survey I mean a thorough detailed examination of the manufacturing end of the mill by a group of practical men (old overseers) with analytical training, who have become specialists in their several departments. I do not mean any "short-cut" method. The complete picture of the needs and possibilities of the mill are given, the order of procedure is outlined and standards in all major items are laid down. The survey group withdraws while the mill goes through its period of preparation, but returns to the mill periodically to check progress and to render what further service it can. When the standards of operation are reached the mill makes its extension, and not before. This is done with or without the assistance of the survey group, as the mill desires.

The mills referred to above are typical of many mills that have reduced their manufacturing costs very considerably by this systematic study of manufacturing conditions. This type of work has been and is being done in mills making all classes of fabrics—fine, medium and coarse. Where the work has been laid out scientifically on a practical basis, and where the mill has reached the standards of machine performance before any effort is made to extend weavers', spinners' or any other help, the results have been satisfactory to the managements and to the help.

Many mill officials have asked why the survey is necessary. "Our superintendent and overseers are of the best, and do not need outside assistance," they say. The main answer is this: The average first-class mill official makes a correction in a mill because he believes it right. The survey makes a recommendation because it has definite objectives of lower costs, and knows that the correction will either directly or indirectly help reach the goal.

Then again, there are the considerations of the experience in many mills; allowing the survey group to function as a clearing house; the detached viewpoint and the specialization training as analysts. There is the same basis of getting a complete story before making any premature moves, that at first glance might seem wise, and which a complete study would subsequently show to be unwise. Before laying the foundation for a house the plans are drawn.

## INFORMATION FOR MANAGEMENT.

What are the objects of this survey? As I see them, they are as follows:—

(1) To indicate methods and detailed corrections that will make the work run so well that it will be possible to

(a) Reduce the cost by having each operative handle a larger production.

(b) Pay good wages to the operative.

(2) To set reasonable standards of mill performance with the object of

(a) High production.

(b) High quality.

(c) A practical measurement of tasks so that under the "extended system" no hand will be overworked, but that all will do full jobs.

(2) That unnecessary work, such as high end breakages, be eliminated.

(3) To lay out a system of continual checking so that standards may be maintained.

(4) To establish a system of investigation so that the mill officials will continue to measure fundamentals systematically after the standards of the survey have been reached.

Let us go back to what happened in Mill "A." The survey organization examined the conditions to find a way to reduce the manufacturing costs. A man went into each department and examined the physical condition of the machines, the fixing and setting. The organizations of draft, speed and twist were checked up, and the cotton blending, humidity, and all other major items of manufacturing were looked into. At the same time, in each department end breakage tests or loom stoppage tests were run. These tests measured not only the amount, but the causes of the difficulties. These should check with the machine observations.

#### ANALYSIS OF LOOM STOPS.

To illustrate this, one weave room was running on 64 × 60, 5.35-yard to the pound prints. The survey had set a standard of 0.5 stops per loom per hour. The loom stoppage tests showed that the loom stoppage averaged about 1.5 stops per loom per hour. In other words, the mill was asking the weaver to piece up and start the loom about three times as often as it should. It asked the weaver (on 24 looms) to piece up an end and start looms 360 times in ten hours, besides filling the batteries. This gained nothing either for the mill or the weaver.

The loom stoppage tests further showed the following causes, the figures indicating stops per loom per hour:—

Weak ends	...	..	...	...	—	.56
Lint and bunches	..	..	...	...	—	.29
Knots	...	...	..	...	—	.25
Kinks	...	...	...	..	—	.15
Tie backs	...	...	...	...	—	.14
Ends coming up	...	...	..	...	—	
Wild yarn	...	..	...	...	—	
Crossed ends	...	...	...	...	—	.05
Wrong draw	...	...	...	...	—	.02
Mechanical	...	...	..	...	—	.10
Total	...	...	...	...	—	1.56

The task became one of finding out the reason "why" of the above causes and the remedies.

#### FINDING THE REASON WHY.

But 0.10 stops out of 1.56 could be placed directly on the weave room, and that from mechanical causes. The weavers were undoubtedly responsible for some of the wrong draws, crossed ends, wild yarn and lint, and the stops for weak yarn were unquestionably exaggerated by certain conditions of the looms, but these possibilities were shared by other departments. There-

fore, the looms were gone over, weavers and tacklers instructed, and check systems installed.

The drawing-in department shared attention for crossed ends and wrong draws. The warpers and slashers contributed the tie backs, ends coming up, some of the wild yarn, and some of the kinks. The spinning-room contributed slightly to kinks when occasionally the frames were stopped as the rails went up. The spoolers also contributed.

Knots were reduced very much by a systematic sharpening of the blades and bill springs, oiling and inspection of the knotters.

Lint and bunches were put in all departments by very poor cleaning and oiling.

To reduce the weak yarn stops required an intensive effort all along the line, starting with the blending of the cotton and proper classing. Many machine corrections were needed. Probably the greatest contribution was the study to retain yarn elastically on the spoolers, warpers and slashers. In the latter machine the stretch was over 4 per cent. One big influence was the establishment of a proper lay on the speeders, so that an even and slack tension could be used throughout the doff.

#### MORE MACHINES, LESS WORK.

I have outlined the high spots only. This study required an intensive study by the survey, and several months' work by the mill, checked from time to time by members of the survey group. Loom stoppage tests were run to measure the progress made. The average of the tests for a considerable time finally showed an average of 0.4 stops per loom per hour, made up as follows:—

Weak Ends ... ..	—	.19
Lint and Bunches .. ..	—	.12
Knots ... ..	—	.03
Tie backs ... ..	}	.02
Ends coming up ... ..		
Wild yarn ... ..		
Mechanical ... ..	—	.04
<hr/>		
Total ... ..	—	.40

On this basis a weaver on 84 looms had to piece up 336 ends in 10 hours, against 360 on the old basis.

Weavers' work-charts were made, walking time taken, and the time to piece ends and start the loom was measured. All battery filling was taken away from the weavers. The extra walking time required was very much less than the time formerly required to fill batteries.

Therefore it is fair to say that the weaver's work was easier on 84 looms than on 24 looms. She received about 12 per cent. more money, and the mill reduced its labour cost. Mr. Paine said that the survey, with its detailed analysis of conditions and laying out and checking the several corrections that were made during the period of preparation, made possible a sane, practical extension of weavers that would have been indeed difficult without it.

The survey further studied the job of the battery hand, increasing the life of the filling bobbin in the shuttle over a minute, and laying out her job so that she could tend as many batteries as the weaver did looms. The tackler was put on to the same number of looms. In other words, the weaveroom was divided into blocks of 84 looms, each block having one tackler, one weaver and one battery hand, all of whom were paid on a piecework basis. The results were higher efficiencies, fewer seconds and a much lower cost.

Mr. Paine continued: "I might go on to speak of work that was done in the other departments along the same lines, until the labour cost was  $4\frac{1}{2}$  cents lower than the previous level. The mill, before this work was begun, was a good mill according to old standards. But the standards of yesterday are not the standards of to-day. The mill is to-day a good mill according to the new standards."

#### METHODS FOR DIFFERENT PRODUCTS.

The applications of extended weaving or spinning, or of any other job, do not follow along the same lines with different fabrics. To continue with weaving, we have cross weaving, back weaving and front weaving. The requirements of each fabric determine the attention that is required by cloth inspection and how much can be spent in actual operation. The picks per inch, or rapidity of the weave, also contribute to the decision. I have in mind one mill running 115 looms to the weaver, and another with 18 looms per weaver, and both are doing all that could be reasonably expected.

Mr. Paine finally said: "I have seen some mills in which the greatest economy can be effected by the retention of the older system of weaving, where the weaver fills her own batteries, and I have seen other mills where a decidedly different system is very much more economical. In other words, each fabric has requirements that must be measured accurately before the task of the operative is defined.

As a result of several years of observation in many mills, I have come very definitely to the following conclusions:—

(1) That before any real undertaking is begun it is a paying proposition to know the complete story before taking any steps, in order that the work may be done most economically and effectively.

(2) That a survey of a cotton mill to determine all influences that govern a certain machine or job is absolutely necessary in order to do away with unnecessary work and needless difficulties.

(3) *That when labour extension is undertaken scientifically and fairly, the job of the operative is easier, more pleasant, and can deserve higher wages.*

(4) That from the above, the task is not really one of "extended labour," but should be defined more accurately as 'extended management.' "

According to the American textile press, the Textile Development Co. of Boston are sending to Europe a group of textile

engineering experts. They have been engaged by cotton mills in Austria, France, Germany, Italy, Sweden and Switzerland to make surveys of the mills and to put into effect the methods used in many American cotton mills to bring about greater efficiency and economies in manufacturing.

This visit is the direct result of the report of the General Secretary on the U.S. cotton mills, published in the last issue of the INTERNATIONAL COTTON BULLETIN.

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## Automatic Loom Enquiry.

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The following circular has been addressed to the weaving firms using automatic looms throughout the world—as far as they are known to us. In case anyone has been overlooked, will they please send answers to the following questionnaire to the Manchester Head Office?

### QUESTIONNAIRE ON AUTOMATIC LOOMS.

The individual answers to this questionnaire will be treated in a strictly confidential manner. Nobody except the General Secretary will know the names of the firms represented by the number in the right-hand corner of this form. This enquiry form must not be signed.

1. How many automatic looms are working in your mill?
2. How many automatic looms does one weaver attend to?
3. How many automatic looms does one tackler (loom-fiver) attend to?
4. How many looms does one battery filler attend to?
5. What is the average count of reed, i.e., number of warp ends per inch?
6. How many picks per minute do your automatic looms make? What reed-space are the looms?
7. Specify character of cloth, width, counts of warp and weft. Number of threads per square inch.
8. What loom efficiency do you obtain?
9. Do you use ring twist (ring warp)?  
Do you use mule twist (mule warp)?  
Do you use ring weft?  
Is this spun on to bobbins which can be used in shuttles?  
What is the lift and diameter of the bobbins?
10. Are you re-winding the weft (filling)? If so, what is the cost of re-winding per lb.?  
What are the counts of weft?  
Please give diameter of pirn, lift and length of yarn on pirn.
11. Have your automatic looms a weft-feeler motion?
12. What additional waste of weft (filling) have you with automatic looms as compared with ordinary looms? (Take the waste on an ordinary loom as 100.)
13. When and how often are the automatic looms cleaned?
14. How many operatives, in all, do you employ per hundred looms and their detailed work?
15. To which make of automatic loom do you give preference?

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# COTTON GROWING

## IN NEW COUNTRIES

### WORLD'S COTTON ACREAGE AND PRODUCTION.

ACREAGE AND PRODUCTION IN COUNTRIES REPORTING  
FOR 1928-29 WITH COMPARISONS.

(Compiled by the Foreign Service of the Bureau of Agricultural Economics.)

Item and Country				1926-27	1927-28	1928-29	Per cent. 1928-29 is of 1927-28
ACREAGE				1,000 acres	1,000 acres	1,000 acres	Per cent.
United States	..	..	..	47,087	40,138	44,916	111.9
India*	..	..	..	22,143	20,592	21,700	105.4
Egypt	..	..	..	1,854	1,574	1,805	114.7
Russia	..	..	..	1,731	1,984	2,250	113.4
Mexico	..	..	..	613	326	521	159.8
Chosen	..	..	..	529	502	505	100.6
Anglo-Egyptian Sudan	..	..	..	216	247	278	112.6
Bulgaria	..	..	..	7	13	15	115.4
Algeria	..	..	..	19	12	10	83.3
Syria	..	..	..	77	74	37	50.0
Alaouiite	..	..	..	—	2	9	450.0
Total above countries				74,276	65,464	72,046	110.0
Estimated world total, excluding China				80,900	73,800	—	—

PRODUCTION†				1,000 bales	1,000 bales	1,000 bales	Per cent.
United States	..	..	..	17,977	12,955	14,138	109.0
Egypt	..	..	..	1,586	1,252	1,430	114.2
Russia	..	..	..	755	983	1,178	119.8
Mexico	..	..	..	360	179	272	152.0
Anglo-Egyptian Sudan	..	..	..	130	126	138	109.5
Tanganyika	..	..	..	20	14	20	142.9
Total above countries				20,828	15,509	17,171	110.7
Estimated world total, including China				28,900	23,800	—	—

Official sources and International Institute of Agriculture.

\* Second estimate, incomplete.

† In bales of 478 pounds net.

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## ALGERIA.

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The weather was favourable for picking, except perhaps in some areas where the rainfall was excessive. The good conditions under which flowering and the formation of the bolls took place in July and August and the weather in September have raised hopes of a good crop, which seem to be confirmed by the remarkable prices ruling for spot purchases.

Hot days and damp nights were prevalent in October, and the bursting of late bolls was favoured.—(*International Institute of Agriculture.*)

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## CHINA.

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Cotton production in China for this season will probably be 10 to 20 per cent. less than last year's large crop, according to Agricultural Commissioner Nyhus at Shanghai. Cotton crops in China's two most important cotton-growing regions near Shanghai and Hankow are considered good, but not as large as the 1927 crop. These regions supply the cotton mills of Shanghai. Reports on the North China cotton crop are conflicting, but it is probable that it is considerably smaller than last year's bumper crop. Part of the cotton from North China is consumed by the mills in Tientsin and Tsingtao, and part is exported to Japan and the United States. A short crop, due to drought, is reported in Western Honan and in Shensi, where China's longest-staple cotton is grown, which competes with American cotton on the Shanghai market.

(*Foreign Crops and Markets.*)

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## MEXICO.

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Total production of cotton in Mexico for this year is estimated by the Mexican Department of Agriculture at 272,000 bales of 478 lbs. net, compared with 179,000 bales for last year. This increase in the size of the crop is due to the fact that the total area planted is 60 per cent. larger than last year.

Picking became general in the Laguna District, Mexico, in the last days of July and continued throughout August, according to Vice-Consul Higgins at Mexico City. The ginning mills were in full operation in August. The yield per acre is not expected to be as large as last year's yield, and may be only 40 per cent. of the March estimate for this year. Late frosts in April, drought in May and June, and poor quality of seed caused the change in the estimate. July rains improved to some extent the condition of the crop, and picking was begun before the boll-weevil and other pests had an opportunity to inflict much damage. In Sonora, crop conditions are normal. The area under cultivation has been increased by new sowings in the Yaqui Valley.—(*Foreign Crops and Markets.*)

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## RUSSIA.

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An official report by the Chief Cotton Committee places the Central Asiatic cotton crop at about 770,000 tons and the Transcaucasian crop at about 82,000 tons, a total of over 850,000 tons. So far the quantity of fibre obtained has been about 33 per cent., but it must be remembered that only cotton from the first picking has been ginned, and the definite yield will probably be about 31.5 per cent. On this basis a total yield of 260,000 to 270,000 tons of fibre may be expected, instead of the 250,000 tons previously estimated. The recorded purchases of raw cotton have been below the plan and below that of last year, only reaching 30 per cent. of the plan in Central Asia and 24 per cent. in Transcaucasia; this is partly due to delay in sending in statistics, partly to lateness in harvesting, but chiefly to the growers' hope of getting better terms from the co-operative buyers.

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## ST. VINCENT (BRITISH WEST INDIES).

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It is estimated that there is an increase in the area planted under Sea Island cotton during the present season, when compared with that of the past. Exact figures are not yet available. Towards the end of September, cotton caterpillars appeared, but not in sufficient numbers to cause serious damage. Normal weather has been experienced — (*Industrial Institute of Agriculture*.)

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## SPAIN.

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During the present cotton season the Government of Spain proposes to devote 10,828 hectares of land (1 hectare equals 2.47 acres) to the cultivation of cotton, according to a recent announcement in the trade press. The Government has also extended the royal decree of October 11, 1923, which authorized 2,000,000 pesetas to be spent annually for the development of cotton cultivation for another five years.

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## UGANDA

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The area sown to cotton this season in Uganda is estimated at 698,000 acres. The condition of the cotton crop is good and a fairly good yield is expected. Last season Uganda produced 112,000 bales of 478 pounds from 540,000 acres.

The area under cotton this year shows a considerable increase in the Eastern district, of 48 per cent. over last year's figure (447,000 acres against 303,000). In Buganda district, on the other hand, the area is unchanged from last year, at 200,000 acres. — (*International Institute of Agriculture*.)

## WORLD'S COTTON ACRE-

## COTONNIER—SUPERFICIE PRODUCTION ET RENDEMENT PAR HA

N.	PAYS COUNTRIES	SUPERFICIE—Area				
		Moyenne Average 1909-10/ 1913-14	1924-25	1925-26	1926-27	1927-28
		hectares	hectares	hectares	hectares	hectares
EUROPE						
1	Bulgarie .. .. .	(1)(2) 1,023	2,146	2,941	3,014	5,106
2	Espagne .. .. .	—	1,418	2,125	2,125	10,457
3	Grèce .. .. .	(2)(3) 12,084	16,263	15,470	14,451	—
4	Italie .. .. .	(4) 3,500	3,500	3,500	14,915	—
5	Malte .. .. .	—	390	659	3,500	—
6	Royaume des Serbes-Croates-Slovenes ..	—	711	831	449	284
	Totaux .. .. .	18,000	24,000	26,000	27,000	33,000
7	U. R. S. S. (5) .. .. .	635,000	569,424	652,550	700,511	804,298
AMÉRIQUE SEPTENTRIONALE ET CENTRALE						
8	Etats-Unis .. .. .	13,820,811	16,737,978	18,637,189	19,055,638	16,249,447
9	Guadeloupe (6) .. .. .	(7) 1,207	300	—	—	800
10	Guatemala .. .. .	—	1,093	1,174	—	—
11	Haiti (6) .. .. .	—	—	29,644	31,031	—
Indes occidentales britanniques						
12	Antigua .. .. .	—	305	59	195	—
13	Barbade .. .. .	—	1,658	931	1,488	—
14	Grenade (6) .. .. .	(10) 1,299	1,620	1,620	1,620	—
15	Iles Vierges britanniques (6) .. .. .	—	40	40	—	—
16	Jamaïque .. .. .	—	51	25	19	—
17	Montserrat .. .. .	—	859	1,416	1,133	1,214
18	St. Christophe et Nièves .. .. .	—	1,825	1,619	890	1,101
19	St. Vincent .. .. .	—	1,562	1,333	1,082	1,381
Indes occidentales néerlandaises (6)						
20	— .. .. .	(11) 145	—	—	—	—
21	Mexique .. .. .	(11) 99,342	140,000	173,528	241,814	123,689
22	(**) Nicaragua (6) .. .. .	—	—	—	—	—
23	Porto-Rico .. .. .	(12) 345	2,428	4,054	4,047	2,000
24	(**) République Dominicaine (6) .. .. .	—	—	—	—	—
25	(**) Salvador (6) .. .. .	—	17,000	—	—	—
	Totaux .. .. .	13,945,000	16,914,000	18,854,000	19,346,000	16,407,000
AMÉRIQUE MÉRIDIONALE						
26	Argentine .. .. .	—	2,091	104,513	110,058	71,746
27	Bolivia .. .. .	—	—	2,100	2,300	2,500
28	Bésil .. .. .	(13) 359,144	636,808	534,357	399,143	490,766
29	Colombie .. .. .	(14) 4,820	16,411	20,000	36,000	—
30	Paraguay .. .. .	(15) 80	11,000	12,152	9,597	—
31	Pérou .. .. .	(16) 66,117	118,000	120,000	—	—
32	Vénézuéla (**) .. .. .	—	—	—	—	—
	Totaux .. .. .	443,000	889,000	799,000	649,000	748,000
ASIE						
33	Ceylan .. .. .	(13) 91	610	730	570	200
34	Chine (18) .. .. .	—	1,966,080	1,904,640	1,428,000	—
35	Chypre .. .. .	(20) 4,210	4,244	4,231	4,978	4,853
36	Corée .. .. .	—	59,203	169,030	196,214	203,385
37	Etablissements français dans l'Inde .. .. .	—	4	51	50	50
38	Indes Britanniques .. .. .	—	9,102,100	10,845,800	11,494,100	10,004,500
39	Indes néerlandaises (6) .. .. .	—	—	10,000	11,000	—
Indochine :						
40	Annam .. .. .	—	7,800	6,800	5,000	5,800
41	Cambodge .. .. .	—	5,903	5,279	5,123	6,726
42	Cochinchine .. .. .	—	400	400	420	400
43	Tonkin .. .. .	—	—	1,580	1,895	1,642

(\*\*) Pays dont les chiffres ne sont compris dans les totaux.

(1) Donnée calculée pour le territoire compris entre les frontières actuelles. (2) Campagne 1914-15. (3) Non compris la Thrace orientale. (4) Donnée moyenne approximative. (5) Données se rapportant au Turkestan, Transcaucasie, Khiva et Bokhara. (6) Exportation de coton égrené et de coton non égrené réduit en filasse. (7) Campagne 1911-12. (8) Estimation de la production. (9) Campagne 1913-14. (10) 1915-16 à 1918-19. (11) 1910-11 à 1913-14. (12) Campagne 1909-10. (13) 1911-12 à 1913-14. (14) Campagne 1915-16. (15) Campagne 1916-17. (16) 1914-15 à 1918-19. (17) 1911-12 et 1913-14. (18) Estimations faites par l'Association de l'Industrie cotonnière Chinoise : les chiffres de la superficie et de la production de 1926-27 ont été calculés en déduisant 25% de ceux de 1925-26. (19) 1916-17 à 1918-19. (20) Campagne 1918-19. (21) 1912-13 et 1913-14.

## AGE AND PRODUCTION

## COTTON—AREA, PRODUCTION AND YIELD PER HA

PRODUCTION DE COTON ÉGRENÉ — <i>Production of lint</i>					RENDÉMENT PAR HECTARE <i>Yield per hectare</i>					N.
Moyenne <i>Average</i> 1909-10/ 1913-14	1921-25	1925-26	1926-27	1927-28	Moyenne <i>Average</i> 1909-10/ 1913-14					
quintaux <i>quintals</i>	quintaux <i>quintals</i>	quintaux <i>quintals</i>	quintaux <i>quintals</i>	quintaux <i>quintals</i>	quint. <i>quintals</i>	quint. <i>quintals</i>	quint. <i>quintals</i>	quint. <i>quintals</i>	quint. <i>quintals</i>	
(1)(2) 1,081	2,704	4,483	5,007	9,491 (1)(2)	1.1	1.1	1.5	1.7	1.9	1
—	2,502	2,402	7,803	7,789	—	1.8	1.1	1.8	0.6	2
(2)(3) 33,098	30,832	31,675	38,504	—	(2)(3) 2.7	1.9	2.0	2.6	—	3
(1) 11,300	9,800	—	—	—	(1) 3.2	3.8	—	—	—	4
— 940	1,040	1,419	920	622	(1) 2.3	2.7	2.2	2.0	2.2	5
—	834	1,238	835	409	—	1.1	1.5	1.3	0.8	6
48,000	48,000	51,000	63,000	56,000	2.7	2.0	2.0	2.3	1.7	
1,962,000	682,509	1,588,000	1,638,000	1,966,400	3.1	2.0	2.4	2.3	2.4	7
28,258,194	29,547,682	34,915,514	38,978,003	28,088,642	2.0	1.8	1.9	2.0	1.7	8
—	267	408	—	(8) 900	—	—	—	—	1.1	9
(9) 313	3,359	3,777	—	—	—	3.1	3.0	—	—	10
20,095	36,057	40,945	49,000	—	—	—	—	—	—	11
533	50	95	340	—	1.8	0.8	0.5	0.4	—	12
2,298	959	1,345	868	—	1.4	1.0	0.9	0.6	—	13
1,728	1,652	1,605	1,924	—	—	1.0	1.0	1.2	—	14
170	2	4	—	—	—	—	—	—	—	15
144	—	—	—	—	2.8	—	—	—	—	16
1,425	1,013	1,283	2,268	3,016	1.7	0.7	1.3	2.0	2.5	17
2,920	1,167	1,415	1,582	1,610	1.6	0.7	1.6	1.0	1.5	18
2,225	2,038	2,656	2,301	1,480	1.4	1.5	1.3	0.9	1.1	19
(11) 340	119	36	43	(11) 2.4	—	—	—	—	—	20
(11) 436,980	425,685	438,510	780,160	338,230	(11) 4.4	3.0	2.5	3.1	2.7	21
640	1,309	204	—	—	—	—	—	—	—	22
(12) 858	—	4,100	—	(12) 2.5	—	—	0.9	—	—	23
(13) 2,521	1,538	1,388	808	—	—	—	—	—	—	24
—	22,977	5,336	497	—	—	—	—	—	—	25
28,729,000	30,024,000	35,427,000	39,824,000	28,491,000	2.1	1.8	1.9	2.1	1.7	
(11) 6,375	153,315	202,200	126,000	220,000	(11) 2.9	1.5	2.7	1.8	2.6	26
—	4,200	4,400	4,800	—	—	2.0	1.9	1.9	—	27
(13) 907,110	1,312,047	1,304,211	1,049,920	1,066,000	(13) 2.5	2.1	2.4	2.6	2.2	28
(14) 12,058	27,007	31,500	54,000	—	(14) 2.6	1.6	1.7	1.5	—	29
(16) 200	26,500	24,893	25,036	—	(16) 2.5	2.4	2.0	2.4	—	30
(17) 260,822	458,620	442,980	560,280	544,541	—	3.9	3.7	—	—	31
—	70,000	70,000	70,000	70,000	—	—	—	—	—	32
1,188,000	1,082,000	2,103,000	1,818,000	1,905,000	2.7	2.2	2.6	2.8	2.5	
(19) 4,825,150	4,715,000	4,579,000	3,434,000	—	—	1.0	0.3	0.8	1.7	33
4,301	5,545	5,541	7,801	3,904	—	2.4	2.4	2.4	—	34
41,800	265,738	267,151	309,388	288,886	0.7	1.6	1.3	1.6	0.8	35
1	258	274	200	225	—	7.1	5.1	4.0	4.5	37
(21) 7,770,000	11,046,000	11,276,000	9,117,000	10,652,000	0.9	1.0	1.0	0.9	1.1	38
30,553	13,923	11,858	13,627	—	—	—	—	—	—	39
—	10,000	6,800	3,000	3,000	—	1.3	1.0	0.6	0.5	40
—	6,375	3,068	3,688	5,184	—	1.1	1.0	0.7	0.8	41
—	420	420	425	480	—	1.0	1.0	1.0	1.2	42
—	—	—	—	—	—	—	—	—	—	43

(\*\*) Countries for which the figures are not included in the totals.

(1) Comprising the territory included within the present boundaries. (2) Season 1914-15. (3) Not including Eastern Thracia. (4) Approximate average. (5) Data referring to Turkestan, Transcaucasia, Khiva and Bokhara. (6) Exports of lint, including exports of unginned cotton reduced to terms of lint. (7) Season 1911-12. (8) Estimate of production. (9) Season 1913-14. (10) 1915-16 to 1918-19. (11) 1910-11 to 1913-14. (12) Season 1909-10. (13) 1911-12 to 1913-14. (14) Season 1915-16. (15) Season 1916-17. (16) 1914-15 to 1918-19. (17) 1911-12 and 1913-14. (18) Estimates made by the Chinese Cotton Millowners' Association; the figures for the area and the production in 1926-27 have been calculated by deducting 25 per cent. from those of 1925-26. (19) 1910-17 to 1918-19. (20) Season 1918-19. (21) 1912-13 and 1913-14.

## WORLD'S COTTON ACRE-

## COTONNIER- SUPERFICIE PRODUCTION ET RENDEMENT PAR HA

N	PAYS COTONNIERS	SUPERFICIE — <i>Ha</i>				
		Moyenne Acrage 1909-10/ 1913-14	1924-25	1925-26	1926-27	1927-28
		hectares	hectares	hectares	hectares	hectares
44	Irak .. .. .	—	—	3,163	—	—
45	Japon .. .. .	3,071	1,829	1,653	1,305	—
46	(**) Peise (1) .. .. .	—	—	—	—	—
47	Siam .. .. .	(2) 4 790	4,480	5,145	3,259	—
48	(**) Syrie et Liban .. .. .	—	29,155	32,900	31,216	30,820
49	(**) Turquie d'Asie .. .. .	(3) 182,467	160,216	158,678	—	—
	<i>Totaux</i> .. .. .	10,923,000	13,025,000	13,636,000	11,730,000	11,947,000
AFRIQUE						
50	(**) Afrique équatoriale française .. .. .	—	3,705	—	—	—
51	(**) Afrique occidentale française (1) : Côte d'Ivoire (1) .. .. .	—	—	—	—	—
	Dahomey .. .. .	—	—	—	—	—
	Guinée française .. .. .	—	7,000	8,000	7,000	7,000
	Haute-Volta .. .. .	—	—	—	—	115,122
	Senegal .. .. .	—	—	—	—	10,000
	Soudan français .. .. .	—	—	—	—	73,000
	Territoire du Niger .. .. .	—	—	—	7,170	—
52	Algérie .. .. .	(2) 647	2,091	3,108	8,453	5,050
53	Angola .. .. .	—	—	—	—	—
54	Congo belge (6) .. .. .	—	8,000	9,000	9,500	—
55	Egypte .. .. .	705,383	751,037	808,394	750,138	636,925
56	Erythrée .. .. .	—	4,000	—	2,500	—
57	(**) Kenya (1) .. .. .	—	—	—	—	—
58	Maroc française .. .. .	—	100	700	1,200	400
59	(**) Mozamb (8) : Terr. de la Comp. de Mozamb. .. .. .	—	17,361	14,887	—	—
	Terr. de la Prov. de Mozamb. .. .. .	—	13,182	—	—	—
60	(**) Nigéria (9) .. .. .	—	—	—	—	—
61	Nyassaland .. .. .	—	—	—	—	—
	Culture des Europ. (Crops by Europ.) .. .. .	(10) 12,431	10,570	7,008	5,406	1,030
	Culture des Indig. (Crops by Natives) .. .. .	—	—	—	—	—
62	Ouganda .. .. .	23,283	225,384	247,186	230,668	215,749
63	Rhodesie méridionale .. .. .	—	27,437	26,744	3,292	—
64	Rhodesie septentrionale .. .. .	—	6,759	4,795	280	—
65	Somalie italienne (11) .. .. .	—	1,128	3,000	4,500	5,500
66	Soudan Anglo-Egyptien .. .. .	17,701	70,252	93,176	90,966	96,989
67	Tanganyika .. .. .	(10) 12,317	—	—	60,700	—
68	Togo (zone française) (1) .. .. .	—	21,000	21,000	—	—
69	Union de l'Afrique du Sud .. .. .	97	58,800	42,523	25,680	22,321
	<i>Totaux</i> .. .. .	783,000	1,214,000	1,352,000	1,269,000	1,131,000
OCEANIE						
70	Australie .. .. .	150	16,253	11,331	—	—
71	Iles Fidji .. .. .	—	113	140	—	—
72	Nouvelle Calédonie .. .. .	—	—	—	400	350
73	Nouvelles-Hébrides (1) .. .. .	—	—	—	—	—
	<i>Totaux</i> .. .. .	2,000	21,000	20,000	20,000	20,000
	<i>Totaux généraux</i> .. .. .	—	—	—	—	—
	non compris l'U. R. S. S. .. .. .	26,104,000	32,117,000	34,987,000	33,041,000	29,986,000
	y compris l'U. R. S. S. .. .. .	26,739,000	32,620,000	35,340,000	33,742,000	30,790,000

(\*\*) Pays dont les chiffres ne sont pas compris dans les totaux.

(1) Exportation de coton égrené et de coton non égrené réduit en filasse. (2) 1911-12 à 1913-14. (3) Campagne 1910-11. (4) Les chiffres de la superficie comprennent aussi des terrains destinés en partie seulement à la culture du coton. (5) 1909-10, 1912-13 et 1913-14. (6) Les chiffres se rapportant aux superficies sont incomplets. (7) 1915-16 à 1918-19. (8) Culture des Européens seulement. (9) Quantités entrées dans le commerce la production totale est évaluée à environ 150-250,000 quintaux. (10) 1910-11 à 1913-14. (11) Cultures irriguées seulement. (12) 1910-11, 1911-12 et 1913-14.

## AGE AND PRODUCTION

## COTTON—AREA, PRODUCTION AND YIELD PER HA

PRODUCTION DE COTON FIBRE — <i>Production of lint</i>					RENDIMENT PAR HECTARE <i>Yield per hectare</i>					
Moyenne Année 1907-10, 1913-14	1924-25	1925-26	1926-27	1927-28	Moyenne Année 1907-10, 1913-14	1924-25	1925-26	1926-27	1927-28	N.
quintaux quintals	quintaux quintals	quintaux quintals	quintaux quintals	quintaux quintals	quint quintals	quint quintals	quint. quintals	quint quintals	quint quintals	
—	4,536	1,908	6,350	3,000	—	1.1	—	—	—	44
7,650	4,528	3,384	2,131	—	2.5	2.5	2.0	1.9	—	45
(2) 240,231	128,234	181,339	183,450	—	—	—	—	—	—	46
—	9,401	10,026	5,956	—	—	2.1	1.0	1.8	—	47
—	21,000	29,100	16,825	23,200	—	0.7	0.9	0.5	0.8	48
(3) 221,407	170,000	228,033	—	—	1.2	1.1	1.1	—	—	49
12,693,000	16,083,000	16,172,000	12,906,000	11,282,000	1.2	1.2	1.2	1.1	1.2	
—	3,052	—	—	—	—	0.8	—	—	—	50
—	8,080	13,600	14,620	—	—	—	—	—	—	51
—	8,550	14,200	10,230	8,500	—	—	—	—	—	
—	—	4,850	5,020	5,000	—	—	0.5	0.7	—	0.7
—	23,790	25,970	13,830	34,000	—	—	—	—	—	0.3
—	4,000	3,480	5,700	5,000	—	—	—	—	—	0.1
—	16,180	13,150	3,800	—	—	—	—	—	—	
—	5,910	6,000	6,000	—	—	—	—	0.8	—	
(5) 2,971	5,175	12,106	16,570	8,850 (5)	8.6	2.5	2.0	2.0	1.8	52
—	6,640	5,970	8,188	—	—	—	—	—	—	53
—	30,000	35,000	48,870	50,750	—	—	—	—	—	54
—	3,268,051	3,578,556	3,137,976	2,725,290	4.5	4.4	4.4	4.6	4.3	55
—	6,000	4,000	6,000	3,000	—	1.5	—	2.4	—	56
(7) 408	4,082	3,712	2,235	—	—	—	—	—	—	57
—	290	900	1,600	800	—	2.9	1.1	1.1	2.0	58
—	—	—	—	—	—	—	—	—	—	59
—	5,411	4,895	—	—	—	0.4	0.4	—	—	
(10) 20,118	71,000	86,025	40,830	36,300	—	—	—	—	—	60
—	—	—	—	—	—	—	—	—	—	61
(10) 10,992	7,834	5,137	2,331	837 (10)	0.9	0.7	0.7	0.4	0.8	
—	4,173	8,867	6,907	4,228	—	—	—	—	—	
—	44,005	355,681	328,144	230,002	242,370	2.1	1.5	1.3	1.0	11
—	—	8,014	1,000	—	—	—	0.3	0.4	0.3	63
—	—	887	171	—	—	—	0.1	0.2	0.6	64
—	1,008	5,300	6,000	8,300	—	—	3.5	1.8	1.1	1.5
—	31,142	88,169	230,826	284,019	270,749	1.8	1.7	2.5	3.1	2.5
(11) (10) 17,284	24,008	39,416	44,054	28,008 (10)	1.0	—	—	—	0.7	67
—	5,012	16,019	12,300	16,611	—	—	—	—	—	68
—	165	36,728	36,970	18,584	24,355	1.7	0.5	0.0	0.7	1.1
—	—	—	—	—	—	—	—	—	—	69
3,265,000	3,860,000	4,310,000	4,120,000	3,364,000	1.2	3.1	3.2	3.3	3.0	
—	—	—	—	—	—	—	—	—	—	
—	163	26,618	12,324	11,000	—	1.6	1.6	—	—	70
—	—	286	216	1,459	641	—	2.5	1.5	—	71
—	—	—	450	1,000	600	—	—	—	2.5	1.7
(12) 1,187	4,920	8,153	—	—	—	—	—	—	—	72
—	—	—	—	—	—	—	—	—	—	73
—	2,000	32,000	21,000	21,000	21,000	1.0	1.5	1.0	1.0	1.0
—	—	—	—	—	—	—	—	—	—	
—	—	—	—	—	—	—	—	—	—	
45,931,000	52,023,000	58,078,000	58,761,000	48,119,000	1.8	1.5	1.7	1.8	1.6	
47,893,000	53,012,000	59,637,000	60,399,000	50,085,000	1.8	1.6	1.7	1.8	1.6	

(\*\*) Countries for which the figures are not included in the totals.

(1) Exports of lint, including the exports of unginned cotton reduced to terms of lint. (2) 1911-12 to 1913-14.  
 (3) Season 1910-11. (4) The figures for the area also comprise land only partly devoted to the growing of cotton.  
 (5) 1909-10, 1912-13 and 1913-14. (6) Figures for areas are incomplete. (7) 1915-16 to 1918-19. (8) Cultivation by Europeans only. (9) Quantity marketed; the total production is estimated at from 150,000 to 250,000 quintals.  
 (10) 1910-11 to 1913-14. (11) Irrigated cotton only. (12) 1910-11, 1911-12 and 1913-14.

*Cable Address :*

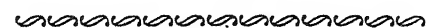
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## Government Preliminary Final Crop Forecast.

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The United States Department of Agriculture, Bureau of Agricultural Economics, Washington, on the 8th December issued the preliminary final estimate of the 1928 cotton crop.

The total indicated yield, excluding linters, is estimated at 14,373,000 bales (500 lbs.), as against a production of 12,956,000 bales in 1927 and 17,977,000 bales in 1926.

The final total ginnings for the season will depend upon whether the various influences affecting the harvesting of the portion of the crop still in the field will be more or less favourable than usual.

The Board's estimate concerning probable yields per acre, per cent. of acreage abandoned, and per cent. of the crop ginner to December 1, is based upon reports from crop correspondents, ginner, field statisticians, and co-operating State Boards (or Departments) of Agriculture and agricultural colleges; and upon actual ginnings to December 1, as reported to the Bureau of the Census.

The abandonment of acreage is estimated at 3.4 per cent. of the estimated acreage of cotton in cultivation on July 1, compared with 4.2 per cent. in 1927, and 3.6 per cent. the 10-year average abandonment (after June 25 or July 1), 1918-1927.

The December revised estimate of area of cotton for harvest in 1928 is 45,326,000 acres, compared with 40,138,000 acres in 1927, and 40,932,000 acres the five-year average 1922-1926.

The total yield of lint cotton per acre on the area for harvest is estimated at 151.8 lbs. in 1928, compared with 154.5 lbs. in 1927, 155.8 the five-year average 1922-1926, and 156.3 lbs. the ten-year average 1917-1926.

Details by States follow:—

STATE	ACREAGE FOR 1928 CROP			YIELD PER ACRE LEFT FOR HARVEST			PRODUCTION (Ginnings) 500lb. gross wt bales <sup>4</sup>		
	Left for harvest	Abandoned	In cultivation	10-yr av 1917-1926	1927	1928 (Dec 1 est)	5-yr. av. 1922-1926†	1927†	1928† (Dec. 1 est.)
	Thous Acres	July 1 pct	Thous Acres	lbs.	lbs.	lbs.	Thous Bales	Thous Bales	Thous Bales
Virginia	79	2.0	81	241	230	265	44	31	44
N. Carolina	1,890	1.5	1,919	256	238	212	1,002	861	840
S. Carolina	2,355	5.0	2,479	191	148	147	793	730	725
Georgia	3,719	4.0	3,874	142	154	131	993	1,100	1,020
Florida	95	6.0	101	102	126	100	26	17	20
Missouri	349	6.0	371	248	188	200	197	115	146
Tennessee	1,086	3.0	1,120	176	178	185	387	359	420
Alabama	3,595	3.0	3,706	140	180	145	1,050	1,191	1,090
Mississippi	3,994	3.5	4,139	174	194	176	1,314	1,355	1,470
Louisiana	1,985	3.0	2,046	156	170	165	589	548	685
Texas	17,766	3.2	18,353	134	129	130	4,460	4,352	5,150
Oklahoma	4,249	4.0	4,426	151	138	133	1,252	1,037	1,180
Arkansas	3,610	4.0	3,760	168	157	161	1,175	1,000	1,215
N. Mexico	108	5.0	114	273	352	310	48	70	70
Arizona	200	1.0	202	280	315	320	95	191	134
California	218	2.2	223	272	340	340	81	91	155
Other	28	3.4	29	197	160	154	14	7	9
U. S.	45,326	3.4	46,943	156.3	154.5	151.8	13,521	12,955	14,373
Lower Calif.‡	160	—	160	—	194	248	—	45	83

\* Not including production of linters, which is usually about 6 per cent. as much as the lint † Allowances made for cross State ginnings ‡ Less than a ten-year average § NOT included in California figures, NOR in United States total. || Including 29,000 bales Egyptian in 1928 and 25,000 bales in 1927

The following table gives the Bureau's cotton crop estimates of the indicated crop for this and the two previous seasons, together with the final ginnings for 1927-8 and 1926-7.

(000's omitted)

	Bales of 500 lbs		
	1928-9	1927-8	1926-7
August	14,291	13,492	15,621
September	14,439	12,692	15,166
October	13,993	12,678	16,627
November	14,133	12,842	17,918
December	14,373	12,789	18,618
Final Ginnings	—	12,950	17,977

## DATES OF COTTON REPORTS IN 1929.

The provisional dates for 1929 cotton reports are as follows:—

May 17, 1929, revision of the report on acreage and yield of cotton in 1928;

July 8, 1929, report on the acreage of cotton in cultivation on July 1, 1929;

August 8, 1929, reports as of August 1 on condition and probable total ginnings of cotton;

# Texas Farm Bureau Cotton Association

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September 9, 1929, reports as of September 1 on condition and probable total ginnings of cotton and estimate of the acreage of cotton abandoned since July 1;

October 8, 1929, reports as of October 1 on condition and probable total ginnings;

November 8, report as of November 1 on condition and probable total ginnings, and

December 9, 1929, reports as of December 1 on preliminary estimate of probable total ginnings of cotton and estimate of acreage of cotton abandoned since July 1 and acreage harvested. All reports are to be made public at 11 a.m., U.S. Eastern time.

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### GINNING REPORT PER DECEMBER 12.

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The ginning report issued on the 20th December (as per the 12th December) showed ginnings to that date of 13,148,000 running bales, as compared with 12,073,000 and 15,541,000 bales in 1927 and 1926 respectively.

The report issued by the Census Bureau to-day shows a total of 13,148,000 bales of this year's crop ginned up to the close of business on December 12. This compares with 12,073,000 bales to the same date last year, 15,541,000 bales in 1926, and 14,832,000 in 1925. The amount ginned since November 30, when the last report was made up, is 587,000 bales, against 335,000 bales in the same period last year, 897,000 bales two years ago, and 961,000 bales three years ago.

The total includes 559,000 round bales, against 487,000 last year, and 22,000 bales American-Egyptian, against 18,000 bales a year ago.

The ginnings for each state were as follows:—

	1928	1927	1926	1925
Alabama .. .	1,059,000	1,163,156	1,414,208	1,336,609
Arizona .. .	108,000	68,700	82,516	82,411
Arkansas .. .	1,072,000	889,821	1,321,363	1,348,947
California .. .	131,000	68,343	98,906	83,240
Florida .. .	20,000	17,148	32,094	39,866
Georgia .. .	1,008,000	1,094,787	1,366,191	1,180,922
Louisiana .. .	675,000	535,674	772,613	867,254
Mississippi .. .	1,393,000	1,311,384	1,647,182	1,708,109
Missouri .. .	107,000	86,288	179,231	227,252
New Mexico .. .	64,000	60,564	53,092	57,529
N. Carolina .. .	800,000	824,442	1,082,646	1,084,653
Oklahoma .. .	1,047,000	912,772	1,292,578	1,516,943
S. Carolina .. .	711,000	716,780	901,815	909,793
Tennessee .. .	358,000	318,914	387,461	452,178
Texas .. .	4,551,000	3,972,633	4,857,315	3,870,959
Virginia .. .	40,000	26,685	41,879	48,342
Other States .. .	4,000	4,672	10,314	16,839
Total .. .	<u>13,148,000</u>	<u>12,072,763</u>	<u>15,540,804</u>	<u>14,831,846</u>

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## SOUTHERN DELIVERY ADOPTED BY NEW YORK.

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Members of the New York Cotton Exchange at a recent meeting voted overwhelmingly in favour of limitation of interest in contracts, a control committee with broad supervisory powers, and for Southern deliveries at five points in addition to the present delivery at New York.

The three amendments, which become part of the by-laws and rules by this vote, are regarded as one of the most important and far-reaching steps ever taken by the exchange.

The amendment in regard to limitation says, in part:—

“ The interest in futures contracts for delivery in any one month of any individual, firm or corporation, and his or its affiliations shall not exceed the limit prescribed by the board of managers, but this limit shall not apply to an interest in any one month wholly composed of hedges against the purchase or sale of spot or cash cotton.

“ When in the judgment of the board of managers the hedging transactions of any individual, firm or corporation and his or its affiliations are of such volume as to unduly affect or endanger the normal parities between months or markets, or for any other valid reason, the board of managers may prescribe a limit in respect to the interest in futures contracts which shall include such hedging transactions.”

The control committee is to be composed of three members of the exchange appointed annually by the board of managers, but not members of the board. The committee has power to direct the treasurer of the Clearing Association to require each carrying member to report the names and interests in any designated position of all clients, as well as his own position, etc.

The identity of clearing members is guarded by the use of symbols, instead of names, in the report to the control committee. When an interest is found in excess of the limit fixed, however, the name of the member holding such interest is disclosed to the committee.

The adoption of Southern deliveries by the exchange necessitates a new contract, making deliveries permissible at seller's option at New York, Norfolk, Charleston, Galveston, Houston or New Orleans.

Precautions have also been taken to safeguard trading and prevent possible artificial influencing of prices through misuse of the six delivery points the exchange will have under the new contract. (*Textile World*.)

---

Trade in the new Southern delivery futures contract began in New York on January 2, the first position to be dealt in being October. The old contract is still being used alongside the new one for October and November, but for all subsequent months is restricted to the new contract on New York and the five Southern points of delivery. When delivery is being made elsewhere than in New York the deliverer deducts 35 points from the invoice price of the cotton.

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1" and above	$\frac{15}{16}$ " to 1"	below $\frac{15}{16}$ "
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## Through Hancock & Murray Gin

1" and above	$\frac{15}{16}$ " to 1"	below $\frac{15}{16}$ "
44.4%	33.3%	22.3%

NOTE the percentage of longer fibres preserved, and consider this value to spinning qualities and less waste.

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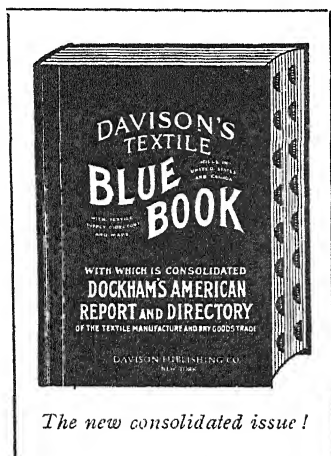
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## ESTIMATED CONSUMPTION OF AMERICAN COTTON.

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Mr. F. W. Tattersall last November issued his estimate of the probable consumption of American cotton, and it is given below:—

	International Federation Consumption 1927-28	Estimated Consumption 1928-29
(Bales in 1,000's)		
United States ... ..	6,535	6,200
England .. ..	1,949	2,000
Rest of Europe .. ..	5,143	4,850
Asia ... ..	1,513	1,550
<hr/>		
Sundries ... ..	15,140	14,600
	267	300
<hr/>		
	15,407	14,900
<hr/>		

It will be noticed that he anticipates a decline on 1927-28 of about 500,000 bales. So far this season world's spinners' takings are 4,603,000 bales, against 5,152,000 bales. A factor of importance is that the Egyptian crop for this season, at  $7\frac{1}{2}$  million cantars, will be about  $1\frac{1}{2}$  million cantars more than last year. There is also every promise of a larger output of Indian cotton. In the circumstances, it is reasonable to expect that spinners on the Continent and in Asia will to some extent turn from American to Indian. In forecasting world consumption the state of trade in the United States is most important. Since the beginning of this season industrial conditions have been very irregular, and worse than a year ago, but there are now indications of an improvement.

If the American crop for 1928-29 is taken as 14,200,000 bales, with a carry-over last season of 5,100,000 bales, the available supplies will be about 19,300,000 bales. In the circumstances, with a consumption of 14,900,000 bales, there is a probability of a carry-over at the end of next July of 4,400,000 bales, or a reduction compared with a year earlier of 700,000 bales.

---

The *Garside Cotton Service*, Boston, Mass., in their report issued under date 24th December, discuss the probable consumption of American cotton during the current season. We make the following excerpts from their statement:—

We estimate world consumption of American cotton, exclusive of linters, during November at 1,344,000 bales, against our revised figure of 1,386,000 for October, 1,419,000 in November last year, and 1,298,000 in November two years ago. Total consumption in the first four months of the season, from August 1 to November 30, was about 5,106,000 bales, against 5,684,000 in the same period last season, and 4,834,000 in the corresponding period the season before last. All figures are in running bales, counting round as half bales.

The decline from 1,386,000 bales in October to 1,344,000 in November was not due to any recession in the activity of the spinning industry. It was due partly to the fact that there were fewer working days in the later month, and

partly to Russia's action in switching from American to Russian cotton as that country normally does at this time of the year. On the basis of average consumption per working day, which is the only real indication of the trend, consumption increased from October to November in the United States, and probably also in foreign countries as a whole. In the total for the month England showed an increase, Germany a slight decrease, and other countries a maintained or increased consumption.

Consumption of 5,106,000 bales in the past four months, multiplied by three, gives an annual rate of 15,318,000 bales. In considering this statement, however, allowance should be made for the fact that Russia, with a consumption in that period of around 300,000 bales, probably used more American cotton in those four months than it will in the entire balance of the season, due to later switching to Russian cotton, but on the other hand the United States, England, and some other countries will probably use American cotton at a higher rate during the last eight months of the season than they did in the first four months. Consumption in the first third of the season by itself is not a safe base for estimating total consumption in the full season. This is shown by the fact that in the season before last consumption in the first third of the season was only 4,834,000 bales, but in the full season it totalled the record-breaking amount of 15,753,000, whereas last season the consumption in the first third of the season was 5,684,000 bales, but the total for the full season was only 15,500,000.

Making allowance for all factors, it would appear that the prospective total for this season is around 15,000,000 bales, possibly somewhat more. This expectation is based on the belief that domestic mills will continue to run at a high rate for some months and will use about as much cotton in this full season as in last season, while foreign mills will increase their consumption of the American staple moderately during the balance of the season. The swinging from American cotton to Indian cotton by foreign spinners, because of the large supplies and relatively attractive prices of Indian cotton, makes it advisable to keep expectations of foreign consumption of American cotton down to a somewhat lower figure than would otherwise be considered probable.

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## AVERAGE WEIGHTS OF AMERICAN BALES.

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According to Col. H. G. Hester, Secretary of New Orleans Cotton Exchange, the average weights of cotton bales handled at the ports to the end of November were as follows:—

August 1 to Close November					
	Number in bales	Weight in pounds	Average weights	Average weights	
Texas .. ..	4,253,959	2,276,633,778	535 18/100	526	84/100
Louisiana ..	755,813	397,542,522	525 98/100	519	31/100
Alabama, etc. ..	146,083	77,101,147	527 79/100	526	92/100
Georgia .. ..	247,394	125,520,294	507 37/100	515	51/100
South Carolina ..	123,229	61,121,584	496	490	
North Carolina ..	78,349	38,234,312	488	490	
Virginia .. ..	147,374	73,687,000	500	500	
Tennessee, etc.* ..	427,906	224,244,139	524 05/100	508	12/100
<hr/>					
Total 4 months ..	6,180,107	3,274,084,776	529 78/100	521	25/100
Aug., Sept., and Oct. ..	4,328,888	2,295,348,557	530 25/100	521	36/100

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\*Average weights based on returns from Memphis and St. Louis. Memphis average 528 22/100 against 509 65/100 last year; St. Louis 500 against 500.

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## INFLUENCE OF MOISTURE AND TEMPERATURE ON COTTON ROOT ROT.

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The Texas Agricultural Experimental Station at College Station have recently issued Bulletin No. 386 with the above title. The experiments were conducted by J. J. Taubenhuis and B. F. Dana, who state in their summary that three climatic factors—rainfall, air humidity and temperature—have been studied to determine the influence of each on the root rot disease. Of the three factors, rainfall is outstanding in its importance. Humidity is seen to have no direct influence. Temperature for the crop-producing portion of the season is seen to be favourable to the development of the disease. Toward the end of the growing season lowered temperatures reduce root rot severity, in spite of favourable moisture.

A further analysis of the data reveals that an adequate supply of moisture at the early part of the season favours development of the disease regardless of the rainfall additions. In mid-season, however, there usually occurs a drought period which checks root rot, and in three out of the five years under study, spread of the disease was completely stopped for a considerable period.

In 1926 no mid-season drought occurred, and root rot continued to develop throughout the season with the result that more than 50 per cent. of the plant population died. The suppression of root rot in those years when the soil moisture was limited and its continued development in a year of abundant moisture show that rainfall is a very critical factor and actually controls mid- and late-season development of the disease. The importance of the moisture factor is further shown by the increase of root rot following the advent of September rains.

Favourable temperature for root rot is seen to occur during the crop-producing portion of the season. That is, the temperature is favourable for development of the disease to a high degree of severity. In September and October, however, lowered temperatures become the limiting factor and cause a sharp reduction. This check in the disease occurs too late in the season to lessen its destructiveness, because plants dying at this time have already produced a crop which is not greatly injured by such delayed death of the plant.

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The installation of the 50-bale unit contract as the sole trading contract of the New Orleans Cotton Exchange was planned for December 15 last, but has been postponed for 60 days.

Commission on 50-bale units will be \$7.50 for buying and selling, but on multiples of 50 bales covered by the same contract and executed on the same day the commission will be \$6.25 per unit, therefore commission will not be higher than it is now to traders who deal at present in transactions of 100 bales. It is expected that the 50-bale unit will make the New Orleans market somewhat broader and more active.

## COTTON GRADE AND STAPLE

The grade, staple length (*a*) and tenderability (*b*) of 10,160,997 bales (*c*) mated from data obtained from classification of samples representing and staple lengths of cotton grown in the United States.

Destination	GRADE		STAPLE					
	Total		* $\frac{1}{16}$ and under		$\frac{7}{8}$		$\frac{1}{16}$	
	bales	%	bales	%	bales	%	bales	%
Crop Total ..	10,160,997	<i>d</i> 100.00	1,452,200	14.29	4,084,836	40.20	2,428,633	23.90
Upland Total ..	10,147,631	99.87	1,452,200	14.29	4,084,836	40.20	2,428,633	23.90
Extra White, Total ..	211,771	2.08	6,740	0.07	36,472	0.36	45,514	0.45
3—G.M. ..	136,615	1.34	2,901	0.03	22,099	0.22	29,362	0.29
4—S.M. ..	56,468	0.56	1,364	0.01	8,523	0.08	11,727	0.12
5—M. ..	13,238	0.13	1,180	0.01	3,822	0.03	3,038	0.03
6—S.L.M. ..	2,954	0.03	425	<i>e</i>	1,166	0.01	882	<i>e</i>
7—L.M. ..	2,496	0.02	870	<i>e</i>	762	<i>e</i>	505	<i>e</i>
White, Total ..	9,147,105	90.02	1,324,686	13.04	3,641,639	35.84	2,214,647	21.80
1—M.F. ..	649	<i>e</i>	200	<i>e</i>	177	<i>e</i>	145	<i>e</i>
2—S.G.M. ..	41,180	0.40	10,197	0.10	17,285	0.17	8,544	0.08
3—G.M. ..	1,565,042	15.40	313,868	3.09	574,665	5.66	371,051	3.65
4—S.M. ..	4,293,087	42.25	587,234	5.78	1,706,249	16.79	1,060,150	10.43
5—M. ..	2,393,217	23.55	254,702	2.51	973,804	9.58	603,839	5.94
6—S.L.M. ..	673,671	6.63	101,057	0.99	204,455	2.00	145,299	1.43
7—L.M. ..	140,115	1.38	39,732	0.39	60,357	0.59	21,163	0.21
*8—S.G.O. ..	32,875	0.32	13,706	0.13	12,213	0.12	3,886	0.04
*9—G.O. ..	7,269	0.07	3,090	0.04	2,434	0.02	568	<i>e</i>
Spotted, Total ..	770,833	7.59	116,124	1.14	398,737	3.92	165,663	1.63
3—G.M. ..	116,064	1.14	15,711	0.15	59,214	0.58	28,741	0.28
4—S.M. ..	432,207	4.25	60,361	0.59	225,447	2.22	94,080	0.92
5—M. ..	192,296	1.89	31,685	0.31	101,014	0.99	37,049	0.36
*6—S.L.M. ..	27,627	0.27	7,435	0.07	12,161	0.12	5,297	0.05
*7—L.M. ..	2,639	0.03	932	<i>e</i>	901	<i>e</i>	496	<i>e</i>
Yellow-tinged, Total ..	8,460	0.08	697	<i>e</i>	5,064	0.05	1,714	0.02
2—S.G.M. ..	347	<i>e</i>	67	<i>e</i>	181	<i>e</i>	67	<i>e</i>
3—G.M. ..	1,549	0.02	75	<i>e</i>	977	<i>e</i>	353	<i>e</i>
4—S.M. ..	4,882	0.05	342	<i>e</i>	2,938	0.03	1,013	<i>e</i>
*5—M. ..	1,329	0.01	132	<i>e</i>	818	<i>e</i>	191	<i>e</i>
*6—S.L.M. ..	269	<i>e</i>	61	<i>e</i>	108	<i>e</i>	90	<i>e</i>
*7—L.M. ..	84	<i>e</i>	20	<i>e</i>	42	<i>e</i>	--	--
Light-yellow-stained, Total ..	1,271	0.01	173	<i>e</i>	603	<i>e</i>	150	<i>e</i>
3—G.M. ..	312	<i>e</i>	49	<i>e</i>	189	<i>e</i>	39	<i>e</i>
*4—S.M. ..	332	<i>e</i>	29	<i>e</i>	162	<i>e</i>	39	<i>e</i>
*5—M. ..	627	<i>e</i>	95	<i>e</i>	272	<i>e</i>	72	<i>e</i>
Yellow-stained, Total ..	339	<i>e</i>	32	<i>e</i>	275	<i>e</i>	21	<i>e</i>
3—G.M. ..	133	<i>e</i>	9	<i>e</i>	115	<i>e</i>	9	<i>e</i>
*4—S.M. ..	97	<i>e</i>	--	--	86	<i>e</i>	--	--
*5—M. ..	109	<i>e</i>	23	<i>e</i>	74	<i>e</i>	12	<i>e</i>
Grey, Total ..	2,192	0.02	147	<i>e</i>	1,160	0.01	550	<i>e</i>
3—G.M. ..	299	<i>e</i>	33	<i>e</i>	153	<i>e</i>	11	<i>e</i>
4—S.M. ..	1,057	0.01	64	<i>e</i>	654	<i>e</i>	218	<i>e</i>
*5—M. ..	836	<i>e</i>	50	<i>e</i>	353	<i>e</i>	321	<i>e</i>
Blue-stained, Total ..	53	<i>e</i>	--	--	42	<i>e</i>	11	<i>e</i>
*3—G.M. ..	42	<i>e</i>	--	--	42	<i>e</i>	--	--
*4—S.M. ..	11	<i>e</i>	--	--	--	--	11	<i>e</i>
*5—M. ..	--	--	--	--	--	--	--	--
*No Grade <i>f</i> ..	5,607	0.06	<i>f</i> 3,601	0.04	844	<i>e</i>	363	<i>e</i>

*a* According to Official Cotton Standards of the United States.

*b* According to Section 5, U.S. Cotton Futures Act.

*c* According to report of Bureau of the Census of November 8, 1923.

*d* Percentages computed to the nearest one one-hundredth of one per cent.

*e* Less than one one-hundredth of one per cent.

*f* Includes all bales not otherwise classified above.

*g* Per cent. of total crop.

## REPORT FOR THE UNITED STATES

of cotton ginned in the United States prior to November 1, 1928; estimate of the cotton ginned by certain gins selected to represent the grades  
(Issued by the Bureau of Agricultural Economics, Washington, D.C.)

IN INCHES

1 and 1½		1¾ and 1½		1¾ and 1½		1¾ and 1½		1½ and over	
bales	%	bales	%	bales	%	bales	%	bales	%
1,219,619	12.00	469,527	4.62	325,753	3.20	140,721	1.38	39,708	0.39
1,219,619	12.00	469,527	4.62	325,753	3.20	140,721	1.38	26,342	0.26
53,604	0.53	56,914	0.56	12,429	0.12	69	e	29	e
34,611	0.34	38,000	0.37	8,950	0.09	37	e	25	e
15,452	0.15	16,314	0.16	3,052	0.03	32	e	4	e
2,843	0.03	2,448	0.02	407	e	—	—	—	—
348	e	113	e	20	e	—	—	—	—
320	e	39	e	—	—	—	—	—	—
1,100,279	10.83	397,417	3.91	305,380	3.00	137,382	1.35	25,675	0.25
65	e	51	e	11	e	—	—	—	—
3,725	0.04	627	e	328	e	239	e	235	e
169,501	1.67	60,253	0.59	17,719	0.17	22,443	0.22	5,542	0.05
536,158	5.28	183,169	1.80	140,614	1.38	67,448	0.66	11,765	0.12
304,416	3.00	118,650	1.17	92,589	0.91	38,250	0.38	6,967	0.07
74,439	0.73	29,957	0.29	20,614	0.20	6,831	0.07	1,019	0.01
10,099	0.10	3,813	0.04	2,996	0.03	1,844	0.02	109	e
1,707	0.02	543	e	497	e	285	e	38	e
169	e	54	e	12	e	42	e	—	—
64,219	0.63	14,771	0.14	7,534	0.07	3,158	0.03	627	e
9,681	0.10	1,797	0.02	549	e	305	e	66	e
26,748	0.36	8,390	0.08	4,975	0.05	1,807	0.02	399	e
15,833	0.16	3,889	0.04	1,769	0.02	895	e	182	e
1,803	0.02	585	e	207	e	139	e	—	—
154	e	110	e	34	e	12	e	—	—
773	e	119	e	93	e	—	—	—	—
20	e	—	—	12	e	—	—	—	—
101	e	21	e	22	e	—	—	—	—
450	e	80	e	59	e	—	—	—	—
170	e	18	e	—	—	—	—	—	—
10	e	—	—	—	—	—	—	—	—
22	e	—	—	—	—	—	—	—	—
215	e	75	e	45	e	10	e	—	—
11	e	23	e	11	e	10	e	—	—
58	e	33	e	11	e	—	—	—	—
146	e	19	e	23	e	—	—	—	—
—	—	—	—	11	e	—	—	—	—
—	—	—	—	11	e	—	—	—	—
—	—	—	—	—	—	—	—	—	—
221	e	79	e	35	e	—	—	—	—
56	e	34	e	12	e	—	—	—	—
73	e	36	e	12	e	—	—	—	—
92	e	9	e	11	e	—	—	—	—
—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—
308	e	152	e	226	e	102	e	11	e

## STAPLE LENGTHS OF UPLAND COTTON.

Staples in inches	bales	%
Total	10,147,631	99.87
¾ and under	1,452,200	14.29
¾	4,084,836	40.20
¾	2,428,633	23.90
1 and 1½	1,219,619	12.00
1¾ and 1½	469,527	4.62
1¾ and 1½	325,753	3.20
1¾ and 1½	140,721	1.38

## ESTIMATED NUMBER OF BALES TENDERABLE AND UNTENDERABLE ON SECTION 5 CONTRACTS

	bales	%
Total Upland cotton	10,147,631	99.87
Total tenderable	8,645,752	85.09
Tenderable ¾ to 1½ incl.	7,686,593	75.65
Tenderable over 1½	959,159	9.44
Total untenderable	1,501,879	14.78

## RELATION OF FARM PRICES TO QUALITY OF COTTON.

In Bulletin No. 383, issued by the Texas Agricultural Experimental Station, G. L. Crawford and L. P. Gabbard discuss the question of the price received by the farmer for his cotton and the bearing the quality of the cotton has on the price.

The chief defect of the local or primary cotton market is its failure to recognize quality as a basis for trading. A corollary to this is the failure to properly reflect central market values. The fundamental weakness involved is the prevailing system of "point buying," or the system of buying cotton on the average basis. Such a system fails to adequately reward quality as designated by grade, staple and character; consequently the individual grower is discouraged in his efforts to improve the quality of his product. The primary object of this study is to more accurately measure and describe the present situation. Such information should contribute to a more satisfactory solution of the problem.

An analysis of the price data collected shows a tendency to follow grade differences, but not a uniform and consistent one. The grades from middling to low middling, inclusive, show a rather uniform difference between the price obtained in the local market and the quoted price for cotton of the same description in the Houston market on the same day, less certain handling charges. This uniformity of differences or spreads indicates a conscious effort on the part of the buyer to recognize grade in the price paid. The net spread of this group averaged about \$3.25 per bale. For the grades below and above this group, with slight exceptions, a much wider spread is shown—averaging about \$5.35 per bale. A plausible explanation of this is that the lower grades were unduly penalized for the lack of quality, while the extra quality of the upper grades was largely disregarded.

Very little evidence, if any, was found of a conscious effort on the part of the buyer to recognize staple length on the individual bale basis. A decided tendency was shown for the spread to widen with an increase in staple length. The average net spread per bale for the different staple lengths is as follows:—

Staple Length		Average Net Spread Per Bale	Staple Length	Average Net Spread per Bale.
		\$		\$
$\frac{3}{8}$ in.	...	.. .74	$1\frac{1}{32}$ in.	... 5.86
$\frac{1}{2}$ in.	...	.. 1.56	$1\frac{1}{16}$ in.	... 7.26
$\frac{5}{8}$ in.	...	... 4.26	$1\frac{3}{32}$ in.	... 8.17
$\frac{1}{2}$ in.	...	... 3.50	$1\frac{1}{8}$ in.	... 8.09
1 in.	...	... 3.93		

It was quite evident that prices tend to conform to the average quality of cotton produced by each community. As an example, the average monthly price paid per pound for strict middling during October at Robstown, Hillsboro, Henderson and Lubbock was 13.25 cents, 13 cents, 11.33 cents and 11.09 cents respectively. The

sample secured at Robstown graded 99 per cent. white, with 80 per cent. of it 1 in. to  $1\frac{1}{16}$  ins. in length; Hillsboro was 91 per cent. white, with 92 per cent.  $\frac{1}{16}$  in. to  $1\frac{1}{8}$  ins. in length; Lubbock was 71 per cent. white, with 92 per cent.  $\frac{1}{8}$  in. to 1 in. in length; and Henderson was 97 per cent. white, with 94 per cent.  $\frac{1}{16}$  in. to  $\frac{1}{8}$  in. in length. This fact suggests the possibility of a community's materially raising its price level by improving the quality of its cotton, particularly the staple. It is too idealistic, however, under the present system of local buying, to expect the individual producer, actuated largely by economic motives, to make a sacrifice for something as intangible as an increase in the average price for the community. The desired response is much more likely to be secured through a system which rewards him personally on the basis of the quality of product which he produces.

### U.S.A. COTTON CONSUMPTION.

The following figures are of the cotton consumed by the mills in America (excluding linters) as issued by the United States Census Bureau:—

	Bales 1928-29	Bales 1927-28	Bales 1926-27	Bales 1925-26
August .. .. .	527,000	633,000	501,000	449,000
September .. ..	492,000	627,000	571,000	483,000
October .. .. .	618,000	613,000	569,000	543,000
November .. .. .	610,000	626,000	584,000	543,000
December .. .. .	534,000	544,000	605,000	575,000
January .. .. .	—	582,000	605,000	583,000
February .. .. .	—	574,000	590,000	567,000
March .. .. .	—	581,000	694,000	635,000
April .. .. .	—	525,000	619,000	578,000
May .. .. .	—	577,000	633,000	517,000
June .. .. .	—	511,000	663,000	518,000
July .. .. .	—	438,000	569,000	461,000
Total 12 months ..	—	6,832,000	7,203,000	6,452,000

### CENSUS BUREAU CARRY-OVER.

The Census Bureau, in its report on cotton production and distribution for the season 1927-1928, gives the following statement of stocks of cotton at specified locations on July 31, 1928.

American cotton is given in running bales, and other cotton in equivalent bales of 478 lbs. Linters in the United States are not included:—

Location	American bales	All kinds bales
Mill stocks:		
United States .. .. .	935,000	1,012,000
United Kingdom .. ..	79,000	210,000
Other European countries .. ..	730,000	1,275,000
All other countries .. ..	382,000	1,952,000
Stocks in public storage in the U.S. .. ..	1,156,000	1,190,000

Location	American bales	All kinds bales
Port stocks :		
United Kingdom . . . . .	506,000	761,000
Other European countries . . . . .	658,000	710,000
Alexandria . . . . .	—	323,000
Brazil (Rio de Janeiro, Pernambuco, São Paulo) . . . . .	—	30,000
Cotton afloat :		
To United Kingdom . . . . .	22,000	108,000
To other European countries . . . . .	157,000	261,000
Stocks held elsewhere in the United States* . . . . .	335,000	335,000
Miscellaneous . . . . .	119,000	1,224,000
† Total . . . . .	5,079,000	9,391,000

\* Includes cotton for export on shipboard but not cleared ; (cotton coastwise , cotton in transit to ports , interior towns, and mills ; cotton on farms and in private storage.

† The table as published by the Census Bureau gave no totals. Those shown above represent our own additions.

## Retrospect of the 1928 U.S.A. Cotton Crop.

*Report by NORMAN S. PEARSE, Assistant to the General Secretary, on his journey in the U.S. Cotton Belt, September-October, 1928.*

ON my arrival in New York (September 14, 1928) I found that the majority of the cotton futures merchants were thinking in terms of a 14½ to 15 million bale crop, but as soon as I reached the Cotton Belt (September 20), I realized that opinion had altered considerably since the Bureau Report of September 8.

The following is a résumé of the interviews I had with many of the cotton exporters, crop experts, bankers, etc., throughout the U.S.A. Cotton Belt.

### ATLANTIC STATES.

Ideas of the crop crystallized round 14 million bales, due chiefly to small bolls, lower ginning out-turn and storm damage in the Atlantic States. Another item was the fact that the plant, although it looked well, tall, and full of leaf with plenty of flowers, had no tap root. The hot weather in September and this lack of tap root caused loss of vitality in the plant and consequent shedding of squares. Each of the Atlantic States, namely, North and South Carolina, Georgia and Alabama, were considered by many cotton merchants to have been overestimated by 100,000 bales each in the September Bureau Report; such a high loss was undoubtedly an exaggeration, but, in any case, on an average, each of these States lost at least 50,000 bales during September.

Other evidence pointing to lower yield was that in each of these States bale weights were turning out lower than last year. The reason for this was that the farmer loaded into his cart what

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appeared to be the same bulk of seed cotton as last year. However, owing to the poor gin out-turn the same quantity of seed cotton did not make as heavy a bale as in the previous season.

Too much rain fell in these States during June, the growing period of the plant, and instead of making a tap root lateral roots were formed. Lacking the essential tap root, the plant was not able to draw moisture from the damper subsoils during the hot weather experienced when the plant was forming bolls. The June rains also washed away the fertilizers from the plant and caused grass and weeds to grow very profusely. The farmers had to keep the weeds down by cultivation, but, in doing so, injured the only roots the cotton plant had, namely, the shallow lateral roots. In August and September some very hot weather was experienced, and the weakly cotton plant was unable to support the growing bolls, shed many of them, or produced small bolls and bolls with a small percentage of lint. In passing, it may be mentioned that the staple also suffered from these same causes practically throughout the entire Cotton Belt.

#### MISSISSIPPI AND TENNESSEE.

In Memphis the expectations of the usual high-grade long-staple cottons from  $1\frac{1}{8}$  ins. (American standard length) upwards were being fully realized, as usual. The medium staple, between 1 in. and  $1\frac{1}{16}$  ins., were conspicuous by their shortage. The longer staples are grown in the river-bottom lands, in very rich alluvial soil brought down by the rivers in times of flood. These lands being low-lying, and consequently moist, produced the long-staple varieties, as always. The medium staples, grown in the sandy hill localities or the top lands, suffered from the same climatic conditions as existed in the Atlantic States, yielding a low ginning out-turn, shorter staple and smaller bolls. Cotton expected to give full  $1\frac{1}{32}$  ins. turned out staple of only  $\frac{1}{16}$  in., and 1-in. cotton came as low as  $\frac{7}{8}$  in. In fact,  $1\frac{1}{32}$  in. cotton was very scarce indeed, not only in Mississippi but throughout the entire Cotton Belt.

Another point that was noticed was the very neppy condition of cotton on the sample tables in Memphis at the beginning of the season. The cause of this, as was explained, was due to the ginning of the cotton while "green" or moist; the moist cotton clogs on the saws of the gin and creates the well-known and much-disliked "nep." Eventually these "neps" work off the teeth of the saws into the ginned cotton. It is usual to have a little neppy cotton at the commencement of the picking season; but this year larger quantities have come forward because the cotton was ginned as soon as picked. This was necessitated by the fact that so many seed cotton storage huts on plantations were destroyed by the floods in the spring of 1927, and have not yet been rebuilt. This quick ginning of the cotton not only makes for neppy cotton but the lint has no opportunity to absorb any oil from the seed while waiting to be ginned—thus failing to obtain the specially prized rich and glossy feel and creamy appearance. It is well known to Memphis cotton buyers that seed cotton stored a week or ten days gives a better grade and a stronger lint than cotton ginned the same day as picked. I heard later that the staple also improved or grew in

length during storage of seed cotton; several planters and buyers corroborated this statement, in spite of the fact that investigations into this question by Government officials at experimental stations did not prove such a view.

#### TEXAS.

The chief complaint throughout Texas was the shortage of staple cotton—the usual staple districts were only turning out  $\frac{3}{4}$ -in. to 1-in. cotton instead of  $1\frac{1}{4}$ -in. and  $1\frac{1}{2}$ -in. This loss in staple was generally attributed to the more general use of the short but high-yielding variety of “Half-and-half” and to premature opening of the bolls during the hot period experienced during August and September; especially as after the heavy rains in June no tap root had been formed. Premature opening also was the cause of smaller bolls and lower ginning out-turn. As a rule, 80 bolls in Texas made 1 lb. of cotton, but this year it is said that it took 100 bolls to gin 1 lb., and in some districts 110 bolls. The ginning out-turn is low this year in most parts of Texas, as normally it only requires 1,500 lbs. of seed cotton to make a bale, whereas this year, on a conservative estimate, 1,600 lbs. were needed. Another sign of a smaller crop than anticipated in Texas was the weight of the bale, which is, on an average, less than last year. Average bale weights given to me varied between 520 lbs. and 530 lbs., as against 540 lbs. last year. One gentleman explained that he had always noticed that in a high-grade cotton year the bales were always lighter, but he had no explanation to give as to the cause.

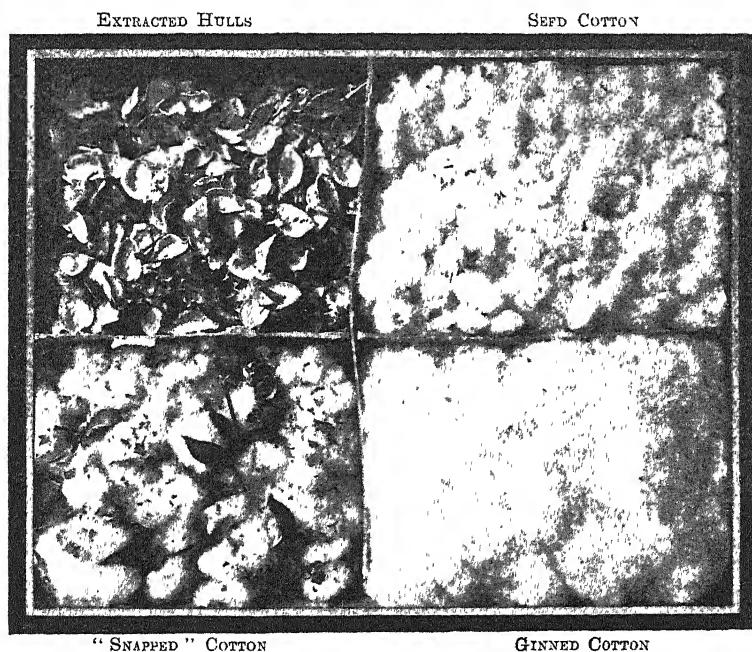
South Texas had produced as much cotton as had been generally expected, but North and West Texas had proved disappointing, due to the heavy rains in June and droughty conditions in August and September. In Central Texas, especially round Waco, the crop was turning out very well; more so in the river-bottom lands, where some staple cotton between 1 in. and  $1\frac{1}{2}$  ins. was being produced. The grades in Texas were chiefly on the high side, averaging between middling and strict middling. On the other hand, I heard from one or two reliable sources that most of the crop was very uneven-running as regards staple—the chief reason given was the frequent replanting necessary. Farmers, in most cases, eventually grew their cotton from seed supplied to them by the oil-pressing mills, as most of the seed reserved for planting had been used up and lost. The price obtained by the oil mills for cotton-seed originally intended for crushing was \$35 per ton, whilst for replanting they charged \$100 per ton; of course it was more remunerative for them to resell it for replanting, instead of crushing it.

The highest price for seed during the picking season this year was in the neighbourhood of \$40 per ton at Memphis for Mississippi seed, which is considered the best as regards oil contents.

Another reason for uneven staple was that the mills sold the farmers larger quantities of Delfos seed where Half-and-half seed had previously been grown. The gins, which are set to gin faster on Half-and-half seed, cut the longer Delfos staple to pieces, and consequently there are considerable quantities of gin-cut Texas cotton this season. It is, perhaps, hardly necessary to mention that the oil mills made no pretence of supplying pure seed, as when the

seed reaches the mill for crushing the different varieties are all stored in the same warehouse and bins.

The crop in the North-Western area of Texas, that is, the Southern Plains and the Cap Rock territory, was delayed owing to frequent replantings. About one-third of the cotton crop was planted at the end of April, which was early for this district. Heavy rains in most districts in May caused replanting to be necessary in about a third of the area in June. The early-planted cotton was expected to make an average crop, but hardly any of the late-planted crop would make any cotton at all. Boll-worm infestation had been very heavy, owing to the wet season, and practically all the bolls of the late cotton and half the bolls on the cotton planted in May were eaten up by this pest. The cotton was very deceptive in appearance, for, owing to the wet season, the plants made luxuriant growth; instead of being only two feet high, they were about



"Snapped" Cotton cleaned by Hancock Picker

*Samples supplied by courtesy of the Murray Company, Dallas.*

3 ft. 6 ins., and even more, and were covered with foliage. They looked good robust bushes, but if one took the trouble to go into the field very few bolls could be found. This kind of plant was christened "Flapper Cotton," for it looked good but had nothing on it!

I was informed that more Half-and-half cotton was being grown in the Lubbock or Cap Rock area than last year; this variety is now being put on the market under the name of "Western Wonder."

The cotton in this territory averaged  $\frac{1}{8}$  in. of middling to strict middling, even though most of the cotton was being "snapped" (the whole boll and hull being broken off when picked). Indeed, throughout the whole of North and North-West Texas the cotton is hardly ever picked, for the farmers have it "snapped" all in one picking. The gins are well equipped with cleaning machinery, and are able to yield a good grade of cotton even from "snaps." One point which ought to be mentioned with regard to "snapped" cotton is that in spite of the excellent cleaning machinery installed at the gins, it is impossible to take out the shale or dried membrane which lies between the locks of the boll, should the boll and the membrane have been crushed during "snapping." Crushing of the boll by the picker's gloved hand during snapping is unavoidable, and in "snapped" cotton there must be a certain quantity of shale, which will cause trouble with broken ends at the spinning mill. So far it has been impossible to get rid of this shale, even with the aid of the modern cleaning machinery installed at the gins, as it is so light and is sucked up by the pneumatic suction pipes along with the cotton.

I found that the gins in the Cap Rock were also running too quickly and causing gin-cut cotton. The fact is that there are far too many gins established on the Cap Rock, and, in order to obtain custom, the ginner buys the cotton from the farmer at from 5 to 10 points over the market price. In order to reduce his cost of production to counterbalance this loss, he runs his gin at a faster speed than he should (ginning eight bales an hour instead of five) for three or four days in the week; on the remaining days he closes down to avoid considerable working expenses in the shape of fuel and wages.

The cotton treated by the cleaning machinery at the gins is said by some to have large quantities of broken staple and motes; indeed, when this cotton is pulled and sampled, one can see large numbers of short motes flying about the room. In order to prevent this fluff being breathed into the nose and mouth, some samplers in this district wear a special nose-and-mouth mask built on the lines of a gas mask. The machinery is evidently too harsh on the staple and breaks it up.

As regards sledding in this district this season, the plant is so tall that I have been told that it will be almost impossible to sled, even after frost. The Lubbock Chamber of Commerce were afraid they would not be able to draw enough pickers into that district in order to gather the crop, because Lubbock and the Cap Rock have such a reputation for sledding. The Mexican pickers do not go there in great numbers for that reason. Propaganda in newspapers, stating that the Cap Rock required 11,000 cotton pickers, caused an influx of this class of labourers, but they came too early and farmers were anxious lest they should drift away to other parts of the Belt.

Mr. D. L. Jones, the Superintendent of the Experimental Farm at Lubbock, is conducting experiments on the sledding of cotton and bollies before and after frost. He sleds the cotton, gathering open and unopened bolls, both before and after the killing frost. The bolls gathered are placed in a heap, and the heat generated in it opens up the unopened bolls in the course of a few days; even

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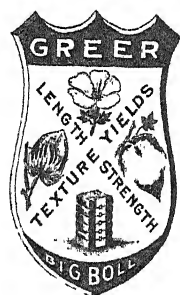
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bolts of the size of a walnut open and make cotton. Mr. Jones is now having spinning tests made of these two lots, gathered before and after frost. He finds that the bollies gathered before frost yield a much better colour than those gathered after. His experiments are not yet complete, but, when he publishes his final results, they should prove very interesting both to the farmer and the spinner.

#### OKLAHOMA.

I entered Oklahoma from the West, and, from the accounts I had heard in Dallas, I expected to see some very poor fields, but I was amazed to find field after field with cotton plants 3 to 4 feet high, literally covered with large-bolled cotton, open from the top of the plant right to the bottom. I had noticed no finer fields anywhere throughout the whole Belt. Each plant seemed to have 20 to 25 bolts open, and not a field had been picked. These conditions prevailed from well within the Texas border nearly into Oklahoma City.

The merchants and exporters in Oklahoma City agreed that there was quite a good crop in the West, but it was much better in East, where it had been mostly picked. In the West the farmers were waiting for every single boll to open, and then they would go right in and *snap* all the cotton at one picking. Most of the cotton out in the West is Half-and-half, approximately  $\frac{3}{4}$ -in. staple, but as regards the grade, rain, which fell a few days after my arrival, must have caused a great loss to those farmers by lowering it. Fifty per cent. of the Oklahoma crop is estimated to be  $\frac{3}{4}$  in. and under, and the grades up to the end of October were between middling and strict middling.

In this State the gins are also equipped for dealing with sledded and snapped cotton, and practically all the cotton this year has been or will be *snapped*. As in North-West Texas, the plants are taller than usual and no *sledding* is expected to be done this year.

In the big-crop year of 1926 a novel use was made of the wheat harvester. The blade or cutting knife was taken out and the machine was run into the cotton fields to sled the cotton. The forked prongs acted as a sled and tore off the open and unopened bolts; these fell on the canvas conveyor, which carried them to and emptied them into a sack; 2,400 lbs. of this mixture of bolts, leaf and sticks made a bale 530 lbs. in weight. The cleaning machinery at the gins was able to take out most of the refuse and yield a fair grade of cotton at a much cheaper cost than if it had been picked. A certain loss of open cotton could not be avoided, but this loss was counterbalanced by the sledging of the bollies which would otherwise not have been picked at all.

The ginner in Oklahoma, especially in the Eastern districts, buy the cotton from the planter in the seed, as they are too busy to run it through the gin separately for each planter on delivery. The ginner stores the seed cotton, and is, of course, unable to prevent mixture of the different varieties. When he has more time he gins this mixture of all kinds of seed cotton, and it can be imagined why Oklahoma cotton has not a good reputation among Lancashire spinners, for the mixture of staple must be very great. I am told that most of the Oklahoma cotton is shipped to Houston and Galveston, and exported from these ports under a Texas bill of lading, and is often passed as Texas cotton on to the spinner

in Europe. I even heard of a case where Oklahoma long-staple cotton was shipped to Clarksdale, Miss., and reshipped from there in order to obtain a Clarksdale bill of lading.

The average staple for Eastern Oklahoma this year is turning out about  $\frac{1}{16}$  in., and in the West, as previously stated, it is  $\frac{7}{8}$  in.; as a rule, in the East  $1\frac{1}{4}$ -in. is obtained; but very little  $1\frac{1}{4}$ -in. is seen this year.

#### ARKANSAS.

Arkansas cotton is, as a rule, a longer-staple cotton than Oklahoma, on an average 1 in. to  $1\frac{1}{16}$  ins., but it is usually softer or not as strong. This year the staple suffered as elsewhere, and came down to  $\frac{1}{16}$  in. to 1 in.; the staple is also very uneven. The grades ran about middling, but lower grades were expected towards the end of the season, as large quantities of cotton had still to be picked even in November.

Snapping is not practised at all in this State, but the custom of buying cotton in the seed by ginner obtains also here. The mixing of different lots at the gins is another reason why the staple is very uneven in the bale.

The boll-weevil caused some damage and decreased the crop in Arkansas, owing to the fact that the farmers had not the money to poison their fields.

One manager of a chain of gins informed me that fully 50 per cent. of the cotton they ginned was bought from the farmers as seed cotton. On being asked how they stored this seed cotton, he stated they kept it in a warehouse, keeping the cotton grown on the bottom lands—the better staple cotton—separate from the cotton grown in the hill territories. When informed that the staples would become mixed, even if he kept the bottom and hill cotton separate, he adopted the attitude that it was not to his advantage to keep each farmer's cotton separate; it would only benefit the merchant and shipper, who never paid enough for their cotton.

"Half-and-half" or "Western Wonder" seed is planted, but not to such an extent as in Texas; however, its use is spreading year by year and it will inevitably spoil the staple varieties.

#### PRICE AND SELLING COTTON ON CALL.

In order to understand what has happened this season as regards "call"-cotton purchases, it is necessary to review the events of the 1927-28 cotton season.

In the 1927-28 cotton season most farmers and small f.o.b. merchants in the country sold their cotton to the larger merchants and exporters "on call." Up to that season this practice had not been much in use, but, due to propaganda in newspapers and by broadcasting stations last year, most farmers expected to be able to sell their cotton simultaneously as soon as the price touched the top. In the meantime, as the cotton was marketed and sold "on call," no hedges were sold by the merchants on the "on-call" cotton. At the same time, spinners and European importers did not buy much cotton "on call," and, when they did, they fixed their prices quickly. On the issue of the Government Bureau on September 8, 1927, the market jumped the 2-cent limit, causing the farmers to expect still higher prices and to hold off from fixing. Then came the issue of the Government price statement and carry-over figure, which

caused the market to fall. Fixation of prices by the farmers then commenced gradually, and as soon as they did so, the transaction between the farmer and the merchant or exporter being complete, the latter sold hedges against the cotton. As is well known, hedge selling tends to depress the market, and the market continued to decline, point by point, until the end of January of this year (1928), at which time most farmers fixed their prices. Incidentally, it was the lowest point touched last season. The farmers and f.o.b. merchants hastened this movement by sending more cotton—cotton they intended holding—on the market when called on for margins on their unfixed cotton, as they had not the money to put up.

This year the situation is entirely reversed. The farmers had learnt that the sale of cotton 'on call' at the top was an unattainable ideal, and they sold their cotton as soon as it was ginned; in fact, the banks forced them to sell it. But the spinner, looking for a 15,000,000-bale crop, expected the price to fall, and bought more cotton than usual "on call," but this year he did not fix the price quickly. In fact, information which I collected from exporters showed that in November about 75 per cent. of the cotton sold up to November had not then been fixed. This was considered by everybody as the most bullish factor of the market; the reason being that as soon as the spinner fixed his price the exporter in America has to *buy back* his hedge, which has a tendency to push up the market, especially when the movement of cotton to the market begins to fall off, which in itself is the cause of declining hedge selling and a strengthening of the tone of the market. In other words, when the hedge buying exceeds the hedge selling the price goes up. Exporters were anxious that spinners should fix their prices during the peak of the movement so that hedge buying and selling would balance out and steady the price. But as the peak of the movement passed with only a very small percentage of the cotton sold having been fixed, opinion became more pronounced that the fixation that must eventually take place would keep the market up. The conditions are exactly the reverse of last year's, when we had a gradually declining market. December and January were expected to be the months when most of the cotton would be fixed, as these were the months when most of the cotton was due to be delivered. Of course later on cotton will be sold for later delivery, but in any case December and January were especially mentioned, as shipments were to be very heavy during these two months. Some exporters went as far as to suggest that the cotton spinners of the world should fix their prices of cotton sold "on call" through some organization, such as the International Cotton Federation, while the crop movement was taking place. A certain percentage of the crop or takings should be fixed each day; the more hedge sales being made the more cotton should be fixed. Such orderly fixation of cotton prices should enable the cotton spinners to obtain their cotton at a cheaper basis than fixing spasmodically throughout the year. What is necessary, they said, is the orderly fixation of cotton sold "on call."

The average price for this season's crop is expected to be approximately 19½ to 20 cents by the U.S. shippers, as against 19.72 cents for the previous season; but most of these people have

not considered the larger crops of outside growths. The only cotton crop which is not expected to yield more than last season's is that of China. Estimates of this season's world's cotton crop approximate 25,000,000 bales, as against 23,133,000 bales for the 1927-28 season. In any case, to average 20 cents the price will necessarily need to reach and stay for a period in the proximity of 22 cents.

Low stocks of raw cotton in Europe, Asia and U.S.A., low stocks of cotton goods, probably lower carry-over next July, better trade conditions and prospects in U.S.A. and Europe were all cited as bullish features. Speculators are also expected to enter the futures market as soon as the financial stock market shows signs of weakening. The Presidential Election is also now out of the way, and a further period of prosperity is expected under the Hoover regime.

#### BOLL-WEEVIL.

In October, the month during which I travelled in the Cotton Belt, the activities of the boll-weevil were confined to the top crop. The pest was well spread out, and it was generally assumed that the damage done this year was about as heavy as last year, when it had been assessed as 18½ per cent.

Boll-weevils were present in very large numbers in Louisiana early in the season, but the farmers in this State poisoned their fields and checked the damage. One heard more complaints in Arkansas of boll-weevil damage than anywhere in the Belt, and this damage could have been avoided if only all the planters had poisoned their fields.

Texas did not suffer from weevil to the extent that had been expected, in spite of the ideal boll-weevil weather early in the season. Hot, moist weather favours the reproduction of the weevil, and large damage was looked for during July and August. The only explanation offered why this damage did not take place was that the weevil begins to come out of hibernation during February, March and April. As there was so much replanting necessary this season, the weevil, during these months, had to subsist on other plants, chiefly the cow-pea; having nowhere to lay their eggs—bolls were not formed until June and July—the majority of the weevil died without leaving any offspring. Thus the number able to attack the cotton bolls later in the season was smaller than usual, except round Dallas.

#### PINK BOLL-WORM.

A menace which may in the future prove to be greater than the boll-weevil to the cotton crop is that of the pink boll-worm. This insect pest has now penetrated into the South-West Cotton Belt from Old Mexico. In South-West Texas a quarantine zone has been created in order to prevent its progress. The authorities are reluctant to give information, and rumours are frequent that the present measures for the prevention of the spread of the pink boll-worm will not suffice to hold it in check.

The pink boll-worm causes great losses to the cotton crops of Egypt, India and South America.

One of the measures of control adopted to limit the spread of the pink boll-worm from infested districts is the fumigation of all

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cotton and seed shipped from infected areas. Fumigation stations have been established along the line of the quarantined counties, but I heard of one case where even a sample passed through the fumigating process without killing a pink boll-worm grub, for when the importer came to open the sample he was alarmed to see the grub on top of the sample.

#### ACREAGE IN 1929.

Most people expect the acreage under cotton to increase next season. On the average, planters this season have made more money than they did last year; then again, the gradual rise in price is always an incentive to increase acreage. During conversation with me, several cotton merchants advanced the theory that if the average price of cotton futures in New York for any season came above the average cost of production for the whole Cotton Belt, which they gave as 18 cents this year, the acreage in the following season would increase. The usual propaganda against an increase of cotton acreage is sure to be circulated again, but the farmer does not take any notice of it, for he has to grow cotton for his cash crop. It must be borne in mind that farmers generally are individualistically inclined, as the very nature of their occupation makes them so, and therefore they are against co-operative action of this kind. Prices for corn are not good, so that cotton promises larger returns than this crop. Furthermore, bankers would rather lend money for growing cotton than corn.

*Manchester, 15th November, 1928.*

### MARKET REPORTS.

*Messrs. F. B. Keech & Co.*, New York, in their market letter of the 27th December, state that their cotton crop traveller writes from Austin, Texas, as follows:—

If the weather should continue as it has been for the first half of December, I doubt that Texas can make a full 5,000,000 bales. It is my opinion that the crop has been so nearly estimated that it is useless to make any further guesses as to what the final ginnings will be.

Too much rain has fallen over the extreme South, preventing the farmer from ploughing the ground, and, while it is good to have the subsoil thoroughly wet, the ground needs to be turned, following which they should have some rain, so as to be ready for planting early next spring. During the last several seasons the Southern, or Corpus Christi, section has not had enough rain for the cotton to grow and not suffer from drought, and it now looks far more favourable for the next crop in that section.

*Messrs. Ralli Brothers* issue the following report on the American cotton situation, under date 27th December last:—

The last report of the Bureau of Agricultural Economics, issued on the 8th December, estimated the production at 14,373,000 bales. If we add to this the figures of the Lower California crop, we expect

the final yield to total about 14,400,000 bales. The latest ginning figure of 13,148,000 bales up to the 12th December affords no grounds for doubting that the above Government estimate will be reached.

On the foregoing basis the statistical position now appears to us as follows (in thousands running bales, ex linters):—

Gross carryover	5,000	vs 1927/28	7,700
Prospective yield	14,400		12,800
Total supplies	19,400		20,500
Estimated consumption	15,300		15,500
Gross surplus	4,100		5,000
Needed for carryover	3,800		3,900
(3 months' consumption)			
Estimated net surplus	300		1,100

The above figures show an appreciable increase in the supplies as compared with the anticipations prevalent about two months ago. The trade improvement has, however, made further progress since then (especially in the United States, France and Belgium) and this has enabled us to increase our forecast of the season's consumption. Conditions are distinctly healthier in the textile industry and prospects point to the maintenance, if not the further expansion, of consumption at the present high rate.

## WEEKLY COTTON EXPORTS FROM U.S.A.

WEEK ENDING FRIDAY, DECEMBER 21, 1928.

	Exports				Total	
	Great Britain	France	Continent	Japan, China, Mexico	This week	This week last year
New Orleans ..	24,359	7,001	16,403	10,913	58,675	17,285
Galveston ..	29,101	20,345	54,760	14,193	118,399	110,742
Mobile ..	17,679	—	1,635	—	19,314	7,516
Savannah ..	6,015	—	703	—	6,718	14,274
Charleston ..	—	—	2,151	—	2,151	2,900
Wilmington ..	—	—	—	—	—	4,400
Norfolk ..	2,565	—	1,115	—	3,680	6,240
Baltimore ..	—	—	—	—	—	100
New York ..	81	870	3,170	—	4,121	1,049
Boston ..	83	—	—	—	83	100
Texas City ..	2,951	793	3,511	2,311	9,566	4,722
Los Angeles ..	352	2,452	5,300	4,275	12,379	6,179
Houston ..	2,505	5,964	34,663	19,195	62,327	53,730
Lake Charles ..	—	—	330	—	330	—
Total ..	85,690	37,425	124,541	50,887	297,743	229,261
Last week ..	87,720	36,640	90,265	44,768	259,393	
Since Aug 1 ..	1,007,209	467,555	2,076,247	863,756	4,414,947	
Last year ..	526,810	527,583	2,007,636	577,941	3,639,970	
Year before ..	1,307,436	580,004	2,406,111	713,345	5,660,896	

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**EXCESSIVE MOISTURE IN AMERICAN COTTON.**

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Recently spinners of American cotton in England have complained bitterly of an unusual amount of moisture in shipments of American cotton, especially in Boweds, which was causing inconvenience and difficulty in working and subjecting many of them to financial loss. Representations on the matter, with a view to securing redress of the grievance, have been made by the English Federation to the Department of Agriculture, Washington, the American Cotton Growers' Exchange, the American Cotton Shippers' Association, and to other quarters.

According to the *Textile World*, there is a movement in the cotton trade in U.S.A. to request the United States Government to issue the monthly cotton crop estimates on Saturdays only. The feeling is that by so doing it would give the trade more time to digest the report and would minimize fluctuations in the market immediately after.

If the United States Government should adopt this suggestion, it would mean that the European cotton exchanges would receive these reports at 5 o'clock on Saturday afternoon, when these exchanges are normally closed, as on the occasion of the last crop report on December 8.

The Garside Cotton Service, Boston, has issued an estimate showing an increase of 1,000,000 acres over last year's acreage in the U.S. Cotton Belt.

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*Switzerland:* Caspar Jenny, Messrs. Fritz & Caspar Jenny & Cie., Ziegelbrücke, Glarus.

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## The Cotton Development of Upper Egypt.

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The cotton cultivation of Upper Egypt has gained during the last five years very considerable impetus through the finding of high yielding Ashmouni types of cotton. On the very up-to-date plantation of Bushra Bey Hanna, which the delegates of the 1927 Cairo Cotton Congress visited, yields as high as 1,100 lbs. lint are obtained, and now we have the assurance of the Cairo Cotton Research Board that they have successfully grown Giza 7 variety with a yield of 650 lbs. south of Assiut. All that section was until recently regarded outside the cotton-growing area, and now comes the news that an excellent long-staple cotton, very little inferior to the Domains staple cotton, has been grown there in several places; the fibre gave 34 mm. halo length, 36 mm. staple pull, and the yield was in all these trial fields as high as the best Ashmouni in the surrounding area.

Of this variety we shall have in Egypt this year 500 feddans, next year 5,000, and in 1931 50,000 feddans, and when the limitation of the Cotton Acreage Act has expired we are bound to see a huge increase in the supply of very high-class cotton through the enormous opening-up which has taken place in Upper Egypt, and it must be recalled that there the pink boll-worm does not flourish, at least not south of Beni-Souef; that there is a longer ripening season; that overwatering is more difficult in Upper Egypt than in the Delta, etc.

The land that has in recent years come under cultivation in Upper Egypt belongs to people who have never grown cotton, and consequently these farmers may grow one-third of their total acreage under cotton, in accordance with the restriction law.

What is going to be the result of this opening-up of additional lands for the growing of fine cottons at a reasonably low price through the high yield? That is a question to which many answers will suggest themselves. Seeing that the yield of a 34 mm. cotton in Upper Egypt is 600 lbs. on an average, whilst in the Mississippi Delta it is not more than 300 lbs. on an average for an inferior fibre, there can be only one result, and that is that Egypt will very shortly vanquish the long-staple production of U.S.A., and meanwhile, gradually reduce the staple premium of the best long-staple cottons of U.S.A. Tyre manufacturers last year came back to Egypt to buy the bulk of their supplies of raw cotton, and they have expressed the opinion that they will do so again in the future.

ARNO S. PEARSE.

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### SOME RECENT ACTIVITIES OF THE COTTON RESEARCH BOARD OF EGYPT.

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In the course of my short stay at Cairo I took the advantage of posting myself up as regards the work carried on with several new cotton varieties, and in conversation with Dr. W. L. Balls, F.R.S., Dr. Templeton and Mr. C. H. Brown, B.Sc., who are at the head of

this energetic work of research, I learnt the following interesting particulars:—

Out of a number of new varieties the Botanical Section of the Ministry of Agriculture is concentrating on three extremely promising strains, viz: Giza 7, Giza 3 and Sakha 4. These new varieties have been tested on the 14 checker plots (small experiment stations) which the Section arranges all along from the northern part of the Delta to Upper Egypt, south of the Assiut, covering 600 miles of latitude.

The halo lengths of these cottons are:—

Giza 3	32 mm.	} as compared with ordinary Uppers of 29 mm.
Giza 7	34 mm., in Upper Egypt	
	35 mm., in the Delta	
Sakha 4	38 mm., as compared with Domains Sakel	36 mm.

It must be noted that halo length does not correspond to staple length, the latter being on an average 2 mm. longer.

Whilst until quite recently Upper Egypt was not considered suitable for long-staple cottons, the experiments undertaken by the Botanical Section have proved conclusively that these new strains, at all events, give excellent yields in Upper Egypt, even in the extreme south. It may, therefore, be claimed that we are witnessing an evolution in Egyptian cotton growing which was never deemed feasible, and that, at all events, Giza 7 will be grown at a cost that will be equal to Uppers and, consequently, if the spinner and producer are able to split the difference, we shall have a condition such as it was repeatedly stressed in the International Cotton Congress at Cairo in 1912 and at the last year's Zurich Conference of the Joint Egyptian Cotton Committee. As regards the quality of Giza 7, it should be stated that the Government grader has even put it as being above 310, when grown in especially suitable localities, and generally it seems to be a cotton something like the old Joanovitch. Besides the high yield per acre (50 per cent. to 25 per cent. higher than Sakel) it has a high ginning outturn.

In 1929 there will be 500 feddans grown of this cotton, and by means of intensive use of every seed it is expected that by 1930 5,000 feddans will be grown.

Giza No. 3 is a substitute for Pillion.

Sakha No. 4 is a Super-Sakel, but it is a better yielder and has the great advantage of being wilt resisting. Of this new strain there will be grown in 1929 200 feddans.

The spinning tests which have so far been made have given uniformly satisfactory results.

In the course of our conversation it was pointed out to me that hardly any of the highest grade crops of Egypt are now sold to England. The Continent of Europe, particularly France and Switzerland, evidently find it to their advantage to pay premiums of 15 dollars over contract prices and obtain the very best grades which the country produces.

I was asked whether the cost of combing is lower than the above price, as it was thought that some mills might be using these cottons without combing them. I was not able to answer this question, but perhaps some cotton men will be able to throw light on the subject.

The future of Maarad is still uncertain on account of the dislike

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of the market for it. While high-yielding cottons such as Maarad must eventually displace low-yielders such as Sakel, there seems to be a probability that Gaza 7, with its eminently likeable staple, will eventually hold the field. Gaza 7 is strangely enough at its best in the extreme north and in the extreme south.

I was also shown the statistics obtained in this Section for the composition of the seed used for sowing over all Egypt during the past two years, and for the coming season, with regard to its content of "Off-typeseed" and "Hindi." The Seed Control Law has had an astonishing effect in pruning away rubbishy seed and so improving the Sakel crop from year to year. It should be noted that the effect of the data, which I was shown for the sowings now being made, will not reach the spinners for another year or so. The improvement of the bulk of Uppers is less marked, owing to administration difficulties which have, however, recently been tracked to their source, and action taken.

This Seed Control Law provides machinery whereby the sowing of any variety deemed unsuitable or dangerous to the country's reputation can be completely prohibited. Action of this kind is being contemplated for the future in respect to certain inferior varieties, especially such as are easily susceptible of mixture with better ones. The reconstruction of the Advisory Cotton Research Board proper, now being undertaken, will provide means for full and careful discussion by all parties interested, before such bold interference is ventured. The fact that some mixing of varieties at the gin does still take place is self-evident from the seed control data.

Much knowledge has recently been gathered as to the cause, amount and time of natural crossing, and practical steps to prevent the contamination of varieties thereby are being taken. The existing arrangements for seed renewal are working very well, and an extension of them to other varieties is contemplated. The seed control can only prune away rubbish from the bulk, which must itself be continually renewed from a strictly pure nucleus stock. By such means it is intended to secure permanence for any variety cultivated.

ARNO S. PEARSE.

*Cairo, 4th January, 1926.*

## Mixing of Different Varieties of Cotton in Egypt.

In consequence of the strong remonstrances made by the cotton spinners at the International Cotton Congress at Cairo in 1927 and again at the Zurich Conference last year by the Joint Egyptian Cotton Committee, the Egyptian Government has promulgated a law forbidding the mixing of different varieties of cotton at the ports. The following letter has been received by Mr. William Howarth, President of the Joint Egyptian Cotton Committee, from Mr. Alfred Reinhart, Alexandria, on this question:—

## EGYPTIAN COTTON CROP ESTIMATE.

Details of the second Egyptian Government estimate of the Egyptian cotton crop, and comparisons with the previous estimate and with the final estimate for 1927-28, are as follows:—

	1928-29 Dec 3 Second Estimate	1928-29 Oct. 1 First Estimate	1927-28 Final Estimate
Sakellaris .. ..	2,342,215	2,357,686	2,520,332
Other varieties ..	4,853,630	4,531,486	3,521,167
Total .. ..	<u>7,195,845</u>	<u>6,889,172</u>	<u>6,041,499</u>
Crop .. ..			6,096,822

Yield per feddan 4.14 cantars.

For the year 1926-7 the crop was 8,634,851 cantars

A cantar is equivalent to 99.05 lbs., and a feddan to 1,038 acres

### ACREAGE LAW.

On the 5th inst. the Egyptian Government published the following communiqué:—

"The Minister of Agriculture informs growers that the law reducing the acreage to be planted under cotton to one-third of the total was enacted for three years to expire in 1929, and that the Ministry has no intention of repealing this law, which will remain in force despite rumours circulated to the contrary"

## ~~EGYPTIAN COTTON CONSUMED IN THE UNITED STATES.~~

(Equivalent 500-pound Bales)

Month	1920-21	1921-22	1922-23	1923-24	1924-25	1925-26	1926-27	1927-28	1928-29
Aug. ..	26,682	20,263	16,707	17,819	11,268	17,865	17,162	22,443	18,594
Sept. ..	19,581	15,896	13,209	15,740	13,527	17,939	22,884	19,639	16,138
Oct. ..	12,867	10,891	15,476	20,846	13,979	17,520	20,812	19,345	19,592
Nov. ..	10,236	22,291	20,439	19,880	19,129	12,559	16,393	20,456	
Dec. ..	7,219	20,779	21,344	18,085	16,491	16,002	17,015	18,584	-
Jan. ..	7,180	20,777	25,947	23,443	18,662	18,313	17,365	20,064	-
Feb. ..	5,600	19,908	25,923	23,040	17,698	19,205	17,250	20,435	-
March ..	9,705	20,390	27,410	20,998	17,965	21,770	21,773	17,018	-
April ..	12,198	16,748	27,145	21,168	16,532	18,197	19,527	16,448	-
May ..	14,765	17,253	29,165	15,846	16,893	17,043	22,013	14,923	-
June ..	15,446	17,205	22,498	13,894	17,824	15,092	26,069	13,949	-
July ..	15,717	15,929	17,070	12,892	17,865	14,591	21,354	13,451	-
Total	<u>157,196</u>	<u>218,330</u>	<u>262,333</u>	<u>223,651</u>	<u>197,833</u>	<u>206,126</u>	<u>239,617</u>	<u>216,755</u>	-

## RUSSIA BUYS EGYPTIAN COTTON.

According to information received in Manchester, it is understood that the Russian Central Cotton Committee has purchased 35,000 cantars of Egyptian cotton from the Egyptian Government's stock in Alexandria.

Telegraphic Address :  
Augustino, Alexandria

Codes :  
Bentley's - Meyer's Atlantic, 35th edition, Private 616

**P. AUGUSTINO & CO.**

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P.O.B. 393

:

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Telegrams: "SALVAGO"

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*Upper Egypt:*

MINIEH &amp; BENI-SOUF

**SUB-AGENCIES:***Lower Egypt:*

SHEBIN-EL-KOM, KAFR-EL-SHEIKH, TEH-EL-BAROUD &amp; BARRAGE

*Upper Egypt:*FAYOUM, WASTA, FASHN, DEIROUT, BIBEH, ABOU-KERKAS, BELEIDA, BOUSH  
MELLAWI, BENI-MAZAR, SAMALLOUT, ABOUTIG, SOHAG

# ALEXANDRIA COMMERCIAL CO.

## (S.A.)

*Head Office:* 9, Rue Stamboul, ALEXANDRIA, Egypt.*Telegraphic Address* "COMMODATE."**CAPITAL:** L.E. 672.000**RESERVES:** L.E. 270.000**Board of Directors:**OSWALD J. FINNEY, *Chairman and Managing Director.*S. LAGONICO, *Vice-Chairman.*B. DELLAPORTA, *Manager.*H. E. FINNEY, *Sub-Manager.*HENRY CLARK, *Manager.*

R. E. WILLIAMS.

**Ginning Factories:** MEHALLA-KEBIR, ZIFTEH and MINIEH.*Foreign Correspondents:*

Reynolds & Gibson, Liverpool, England. N. V. McFadden's Cie., Rotterdam,  
W. H. Midwood, Liverpool, England. Holland.  
Geo. H. McFadden & Bro., Philadelphia, U.S.A. James Heye, G.m.b.H., Bremen, Ger-  
many.  
Raffaele Rietti, Milan, Italy. Dir. Friedrich Kusel, Leipzig, Saxony.  
Société d'Importation et de Com- Goshō Kabushiki Kaisha, Osaka, Japan.  
mission, Havre, France. Goshō Kabushiki Kaisha (Ltd.), Bom-  
Walter Kuske, Winterthur, Switzerland. bay, India.  
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**Buying Agencies in the principal centres of Lower and Upper Egypt  
and the Sudan.**

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## Market Reports.

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*Messrs. Reinhart & Co.*, Alexandria, in their market letter dated 4th January, 1929, state:—

During the few working days since Christmas, the market has been very quiet. A certain weakness in Sakellaridis may be notified owing to important January tenders amounting so far to 27,250 cantars. This quantity was, however, received by one firm who is said to be prepared to receive much larger amounts. The tenders were effected by about thirty different concerns in small quantities. This is considered to be a weak effort by bears to counteract bull manipulation.

The Egyptian Government have this week sold to the Russian Government 4,000 bales of Sakellaridis out of their stock.

Our Government have further promulgated the law restricting the area under cotton to one-third of the arable land during the year 1929. It is, however, likely that certain exceptions will be granted to farmers as was done last year.

Exports of Sakellaridis since September 1, 1928, to December 29, 1928, amount to 134,778 bales against 134,737 bales during the same period a year ago. Shipments of this growth therefore are slightly ahead of last year's figure, in spite of the comparatively high price and small crop of the present season. Shipments of other growths are considerably larger, the total of all varieties amounting to 3,067,583 cantars in 1928, against 2,350,125 cantars in 1927 during the first four months of the season.

Spot sales at Minet el Bassal average about 3,500 bales daily. There is, however, little demand from spinners at the moment and the tendency remains uncertain.

---

*Messrs. P. Augustino & Co.*, Alexandria, report under date 3rd January as under:—

Prices remained fairly steady up to the 29th December, the last business day of 1928, in spite of a fair amount of bull liquidation prior to the close of the year, there being a sufficient volume of trade buying to absorb all cotton offered for sale. Contrary, however, to expectations, the beginning of the new year has not been of a satisfactory nature to those who expected with its coming a revival of business and higher prices. Both yesterday and to-day there has been a scarcity of buyers, and some people, who have been up till now in favour of higher prices, seem to be hesitating.

Last night's decline in the New York market contributed to the discouragement and bull liquidation continued to-day. The first January tender of 27,750 cantars, which has been issued to-day, renders the position of bulls less easy. The tender, however, has been promptly stopped by the leaders of the bull movement, who also continued to buy moderate lines.

This made a good impression on the market and encouraged some bulls who were wavering to hold on to their positions, and others who had previously liquidated seem to be again in favour of buying.

It is rumoured that the Egyptian Government has sold to Russia 4,000 bales.

On the whole Sakels continue to be in a strong position. Nearly everybody is agreed that the Sakel crop will not exceed  $2\frac{1}{4}$  million cantars and it is believed that cultivators in Lower Egypt have very little cotton left in their hands, hardly 2 @ 3 % of the lower Egypt total production. Arrivals from Lower Egypt will cease much sooner than in normal seasons.

---

*The Alexandria Commercial Co., (S.A.)* in their weekly report, dated 3rd January, state:—

**SAKELS:** The market this week has not shown the firmness to which we have become accustomed recently. After an undecided beginning, the market reacted sensibly on some long liquidation, induced by the decline in New York and the depressing effect of heavy tenders against January on the first delivery date.

It is reported that the whole of this first tender is being taken up by one export house, but as it is expected that similarly heavy quantities will be tendered on the two remaining January delivery dates, there is much speculation as to what will become of these tenders if the export house in question decides not to receive them.

The demand from spinners has again been extremely poor, and the latest reports received from textile centres are unanimous in condemning the present high levels as unreasonable and in expecting that Sakel will be taken in continually diminishing quantities during the balance of the season if these levels are upheld.

**SPOT:** During the past week the market at Minet el Bassal has been open only four days, due to holidays, but a rather better business has been done. Sales amount to about 14,300 bales, of which we estimate 5,600 bales Sakellaridis, 7,700 bales Ashmouni and Zagora, 600 bales Pillion and 400 bales other varieties.

**UP-COUNTRY:** The movement of cotton is growing smaller, but stocks in the factories are still fairly large. It now looks as if the crop is likely to be slightly larger than the figure we anticipated and will, in all probability, reach about  $7\frac{1}{2}$  to  $7\frac{3}{4}$  million cantars, of which about  $2\frac{1}{2}$  million cantars Sakel.

---

*Messrs. G. D. Economou & Co., Alexandria,* in their weekly report dated 3rd January, write as follows:—

As regards Ashmouni, values in themselves are low enough not to leave any big margin for a further drop. As far as concerns Sakel, when the prices of this growth are considered in relation to Ashmouni and other varieties they certainly appear a little exaggerated, but sight must not be lost of the special situation of Sakel, nor of the fact that this growth is being manipulated by a

powerful firm, which certainly will not easily abandon their policy. In this connection, we may say that to-day's tenders (first January tender) amounted to 27,750 cantars, the whole being taken up by the firm in question.

During the last few days spinners have displayed a certain amount of interest, particularly in Sakel, and if, after the fall at the end of the week, prices become stabilized we think that this interest will increase, as, whatever may be said on the subject, spinners need a certain quantity of Sakel, supplies of which are not abundant this year, and we consider that present prices cannot be looked upon as prohibitive.

---

*Messrs. J. G. Joannides & Co*, Alexandria, write in their weekly report, under date 8th January, as follows:—

**SUDAN:** The Sudan Government has published its second estimate of the Sakel crop, which is put at 584,000 cantars raised from 211,000 feddans. This is slightly better than its first estimate (572,000), but from information received by us the final crop will turn out even larger, and may attain 650,000 cantars. We are still without any information of the quality and staple of the first arrivals. Picking is now general all over the country.

The first auctions in Tokar will take place on the 3rd February.

---

# J. G. JOANNIDES & CO.

*Cotton Merchants*

## ALEXANDRIA (EGYPT)

With Buying Agency and Ginning  
Factory at TANTAH (Garbieh).

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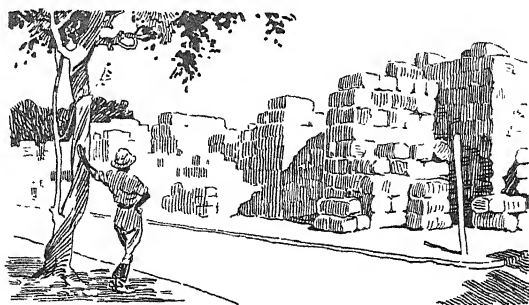
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ESTABLISHED 1863.



## East Indian Cotton.

### THIRD GOVERNMENT COTTON FORECAST, 1928-29.

This forecast is based upon reports furnished by the under-mentioned provinces and states, which practically comprise the entire cotton area of India. It deals with both early and late varieties of cotton and relates generally to conditions up to the beginning of December, 1928.

The total area sown amounts to 24,992,000 acres, as against 23,182,000 acres (revised) at this date last year, or an increase of 8 per cent. The total estimated yield is 5,996,000 bales of 400 lbs. each, as compared with 5,486,000 bales (revised) at the corresponding date last year, or an increase of 9 per cent.

Weather conditions, on the whole, have not been quite favourable. The present condition and prospects of the crop appear to be fairly good.

The detailed figures for the provinces and states are shown below (the figures for the previous years are given in the appended statement):—

Provinces and States	Area	Outturn	Yield
	Acres (thousands)	Bales 400 lbs. each (thousands)	per acre lbs
Bombay* .. .. .	7,033	1,750	100
Central Provinces and Berar ..	4,930	1,254	102
Madras* .. .. .	1,975	406	82
Punjab* .. .. .	2,734	568	83
United Provinces* .. .. .	708	254	144
Burma .. .. .	329	62	75
Bengal* .. .. .	78	21	108
Bihar and Orissa .. .. .	77	14	73
Assam .. .. .	44	17	155
Ajmer-Merwara .. .. .	44	21	191
North-West Frontier Province ..	16	4	100

\* Including Indian States.

Provinces and States	Area	Outturn	Yield
	Acres (thousands)	Bales 400 lbs. each (thousands)	per acre lbs
Delhi ..	2	1	200
Hyderabad ..	3,805	954	100
Central India ..	1,315	268	82
Baroda ..	782	149	76
Gwalior ..	583	99	68
Rajputana ..	462	130	113
Mysore ..	75	24	128
Total ..	24,992	5,996	96

On the basis of these figures the average outturn per acre of the present crop for All India works out to 96 lbs., as against 95 lbs. last year.

A statement showing the present estimates of area and yield according to the recognized trade descriptions of cotton, as compared with those of the preceding year, is given below:—

Descriptions of Cotton	Acres (Thousands)		Bales (Thousands)	
	1928-29	1927-28	1928-29	1927-28
Oomras—				
Khandesh ..	1,345	1,450	306	298
Central India ..	1,898	*1,883	367	386
Barsi and Nagart ..	3,869	3,844	923	832
Hyderabad Gaorani ..				
Berar ..	3,380	3,344	874	800
Central Provinces ..	1,550	1,526	380	392
Total ..	12,042	*12,047	2,850	2,708
Dholleras ..	2,839	2,212	781	608
Bengal-Sind—				
United Provinces ..	708	657	254	204
Rajputana ..	506	*464	151	*118
Sind-Punjab ..	2,100	1,551	491	445
Others ..	83	83	16	16
Total ..	3,397	*2,755	912	*783
American—				
Punjab ..	919	772	167	237
Sind ..	24	16	5	3
Total ..	943	788	172	240
Broach ..	1,134	1,184	276	265
Coompta-Dharwars ..	1,610	1,540	351	330
Westerns and Northern	1,539	1,276	265	206
Cocanadas ..	226	190	41	35
Tinnevelles ..	366	327	98	90
Salem ..	153	141	29	26
Cambodias ..	273	207	120	89
Comillas, Burmas and other sorts ..	470	515	101	106
Grand Total ..	24,992	*23,182	5,996	*5,486

\* Revised.

† Includes the whole of cotton grown in the non-Government areas of Hyderabad.

## INDIAN COTTON CONSUMED IN MILLS IN INDIA.

DURING THE MONTH OF OCTOBER, 1928.  
(In Bales of 400 lbs.)

*Issued by the Indian Central Cotton Committee and based on Returns made under the Indian Cotton Cess Act.*

	Consumption during October, 1928	Consumption during the corresponding month last year	Consumption since September 1 1928	Consumption during the corresponding period last year
Bombay Island .. ..	29,625	53,292	30,921	107,107
Ahmedabad .. ..	26,814	22,850	50,923	46,688
Bombay Presidency	71,877	89,178	109,154	181,014
Madras Presidency	15,776	15,552	30,325	30,153
United Provinces ..	14,444	13,066	28,507	29,529
Central Provinces and Berar .. ..	9,969	9,287	19,318	17,879
Bengal .. ..	5,906	6,742	10,759	14,190
Punjab and Delhi ..	5,187	3,593	9,291	7,471
Rest of British India ..	1,725	963	3,257	1,920
Total for British India ..	124,884	137,981	210,611	282,156
Hyderabad .. ..	1,401	1,098	2,822	2,246
Mysore .. ..	3,503	3,368	7,062	6,597
Baroda .. ..	4,155	3,709	7,956	7,341
Gwalior .. ..	3,089	1,931	5,906	4,091
Indore .. ..	6,305	5,085	11,633	10,858
Total .. ..	18,453	15,191	35,399	31,133
Other Indian States (calculated from yarn production) .. ..	Not received	4,278	4,293	8,886
Total .. ..	143,337	157,450	250,303	322,175

## EAST INDIAN COTTON ESTIMATES.

(In Thousands).

*Messrs. Ralli Brothers*, under date 27th December, issue the following forecast of the East Indian Cotton crop:—

SEASON · September/August (bales of 400 lbs)	1928-29	1927-28	1926-27	1925-26
RECEIPTS:	Present	Previous	Final	Final
Oomras .. ..	3,050	3,250	2,760	2,321
Dholerah .. ..	450	425	400	328
Bengal/Sind .. ..	1,150	1,300	1,050	884
American Surats .. ..	525	650	400	472
Broach/Surti .. ..	440	450	400	386
Comptah/Dharwar .. ..	300	300	225	188
Western/Northern .. ..	340	300	250	190
Cocanada .. ..	40	40	45	52
Tinnevely .. ..	220	200	200	183
Cambodia .. ..	130	125	120	98
Comilla styles .. ..	35	35	40	46
Rangoon and sundries ..	70	75	70	70
Total (including the Opening Balance in India) .. ..	6,750	7,150	5,960	5,218
Handlooms, etc. .. ..	750	750	750	750
	7,500	7,900	6,710	5,968

SEASON · September/August (bales of 400 lbs.)	1928-29		1927-28	1926-27	1925-26
SUPPLIES from India :	Present	Previous	Final	Final	Final
Of which Opening Balance in India .. ..	950	950	340	398	311
YIELD :					
Our Estimate .. .	6,550	6,950	6,370	5,570	6,570
Government's .. ..	5,996		5,871	4,973	6,038
ACREAGE : Estimate of Final ..	24,992		26,000	25,500	27,960
DISTRIBUTION :					
Europe, etc. .. .	1,750	1,750	1,531	963	1,205
Japan and China .. .	2,200	2,200	1,654	1,845	2,511
Indian Mills .. .	2,100	2,100	1,825	2,070	2,017
Handlooms, etc. . .	750	750	750	750	750
Total takings .. ..	6,800	6,800	5,760	5,628	6,483
Supplies, as above .. .	7,500	7,900	6,710	5,968	6,881
CLOSING SURPLUS IN INDIA ..	700	1,100	950	340	398
ESTIMATED WORLD SUPPLIES (Visible and invisible) at the season's opening .. ..	2,550		1,700	2,350	2,350
MILL CONSUMPTIONS (Aug./July) as per the International Cotton Federation :					
Europe, etc. .. ..	--	--	1,110	966	1,261
Japan, China, etc. .. ..	--	--	1,573	2,043	2,296
Indian Mills .. ..	--	--	1,840	2,188	2,015
ACTUAL BALES :					
Excluding Indian Handlooms, etc. --	--	--	4,523	5,197	5,572
Add for Handlooms and weight basis .. ..	--	--	825	825	825
Sundry consumptions and losses --	--	--	150	150	180
TOTAL CONSUMPTION in bales of 400 lbs. .. ..	--	--	5,498	6,172	6,577
CONSUMPTION, E. INDIAN = per cent. of AMERICAN .. .	--	--	35.4	38.5	47.0

Basing ourselves on the above figures, we make the outlook for the statistical position at present as follows (in thousands):—

Gross world carry-over	2,550	vs. 1927/28	1,700
Estimated yield	6,550		6,370
Total supplies	9,100		8,070
Estimated consumption	6,800		5,498
Gross surplus	2,300		2,572
Needed for carry-over (4 months' consumption)	2,250		1,841
Estimated net surplus	50		731

The unreasonable weather which prevailed in the latter part of the season, and which affected mostly the Oomra, Bengal and American Surat crops, has caused us to reduce somewhat our estimates for these crops.

High qualities of these styles are becoming scarce and are likely to command good premiums in view of the scarcity of low grade Americans in this season's supplies.

The demand for silky Bengals is now developing, and both the Indian Mills and the Far East appear eager to secure the remaining stocks. This crop was of exceptionally high class this season, but the higher qualities are being fast absorbed by the mill demand.

The Government of India have just issued their third estimate of the crop, which works out over  $\frac{1}{2}$  million bales below ours. This underestimation of the crop is, however, a constant feature of the Government forecasts, and the average of the consumption of East Indian cotton over a number of years shows conclusively that the Government estimates of the yield are too low.

### COTTON EXPORTS FROM INDIA TO EUROPE.

*From 1st September, 1927, till 31st August, 1928 (in actual bales).*

Exporters	Bombay	Karachi	Madras	Calcutta	Tuticorin	Cocanada	Total
Volkart Brothers..	162,445	118,394	46,925	6,690	10,404	1,077	345,935
Ralli Brothers ..	118,142	103,833	14,507	14,920	7,700	1,168	260,270
Nippon Menkwa K. Kaisha Ltd ..	55,867	47,989	—	1,219	3,786	—	108,861
Kilachand Devchand & Co., Ltd. ..	58,918	39,891	—	—	—	—	98,809
Forbes, Forbes, Campbell & Co...	65,816	30,310	—	688	—	—	96,814
Bombay Co., Ltd.	20,213	26,567	8,624	—	2,177	—	57,581
Gosho, Gosho K. Kaisha, Ltd ..	34,629	18,310	—	—	—	—	52,993
Toyo Menka K. Kaisha, Ltd. ..	27,458	15,764	—	—	—	—	43,222
Vurdhman Brothers Ltd. ..	34,128	7,994	—	—	—	—	42,122
Chachaty & Thacker- sey, Ltd. ..	26,356	10,923	—	—	—	—	37,281
Louis Dreyfus & Co	6,645	26,750	—	—	—	—	33,395
Patel Brothers ..	26,316	6,341	—	—	—	—	32,657
E. Spinner & Co. ..	23,214	6,923	—	—	—	—	30,137
Gill & Co. ..	2,004	22,906	—	—	—	—	24,910
About 150 Sundry Shippers..	136,247	79,561	890	1,865	745	—	219,308
Total ..	798,398	562,458	70,946	25,382	24,812	2,245	1,484,241



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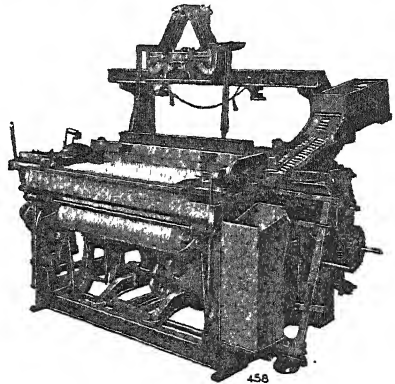
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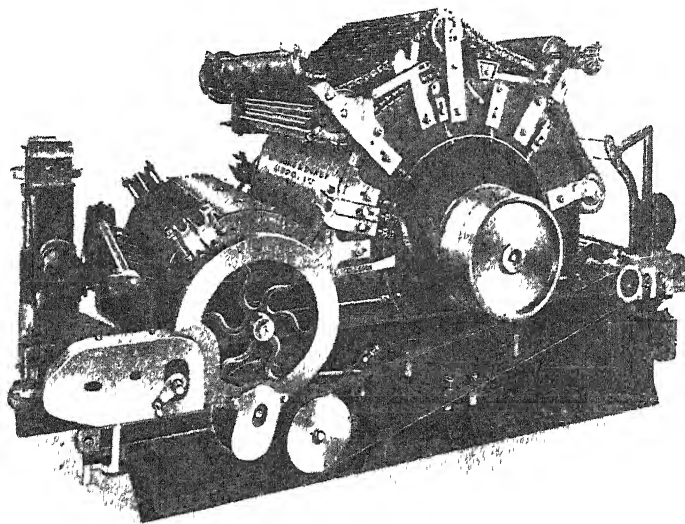
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Head Office : **UNION IRONWORKS, WEST GORTON, MANCHESTER, ENGLAND**



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## Causes of Bad Weaving.

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The National Association of Cotton Manufacturers, Boston, publish the following list of causes of bad picking. They state that while the cause may be primarily due to any one of the troubles listed, it is more frequently a combination of several that is the basis of the trouble.

Shuttle flying out:—

1. Shuttle box too tight.
2. Shuttle box too loose.
3. Shuttle box too open at the mouth.
4. A badly shaped or worn shuttle.
5. Pick too strong.
6. Pick too weak.
7. Pick not at proper time.
8. Worn picker.
9. Picker too low.
10. Rebounding shuttle.
11. Overfaced reed.
12. Underfaced reed.
13. Yarn too high off race plate.
14. Loose top shed.
15. Individual loose ends.
16. Loose race plate.
17. Parallel motion loose or worn.
18. Springy or split picker stick.
19. Temple too high off race board.
20. Box back out of line.

### *On Box Looms.*

21. Wrong timing of box motion.
22. Groove worn in picker stick from contact with raw hide picker.
23. Centre stop motion wires too low or out of time.

The above causes are also peculiar to banging off of looms, but are the main causes of flying shuttles.

Loom banging : —

1. Late pick.
2. Early pick.
3. Weak pick.
4. Strong pick.
5. Cracked or part-broken lug straps.
6. Lug strap too tight or too loose.
7. Cracked picker stick.
8. Rebounding shuttle.
  - (a) Picker too strong.
  - (b) Not enough check.
  - (c) Loose box.
  - (d) Protector finger slipping.
9. Loose picker stick.
10. Belt slipping.
11. Lost motion in cone.
12. Worn cone or cone stud.
13. Worn picking point.
14. Picking shaft lifting.
15. Picking shaft not vertical.
16. Slack driving pulley.
17. Belt too slack.
18. Irregular power speed.
19. Picker stick not in right alignment.
20. Loose or broken picking arm.
21. Badly shaped or worn binder.
22. Broken binder pin.
23. Breast beam too high or too low.
24. Shed too small or not properly adjusted.
25. Broken heddles (healds).
26. Knot or snarl in warp.
27. Warp too tight.
28. Dirty shuttle or shuttle box.
29. Projecting reed wires.
30. Bobbins too large for shuttle.
31. Change of atmosphere.
32. Lug straps too far from picker stick.
33. Shedding cams too early or too late.

Looms stopping : —

1. Filling (weft) catching on fork.
2. Fork too far through grate.
3. Not sufficient friction on filling (weft) in shuttle.
4. Filling (weft) slipping up or down on fork.
5. Wrong timing of stop-motion cam.
6. Crooked-running shuttle.
7. Stand for shipper handle worn.
8. Occasional rubbing of dagger against frog.
9. Broken warp end.
10. Cutting filling (weft).
  - (a) Groove in shuttle not deep enough.
  - (b) Temple too low.
  - (c) Sharp eyelet in shuttle.
  - (d) Shuttle rising in box.

THE LOOM THAT NEED NEVER STOP

# MODERN WEAVING

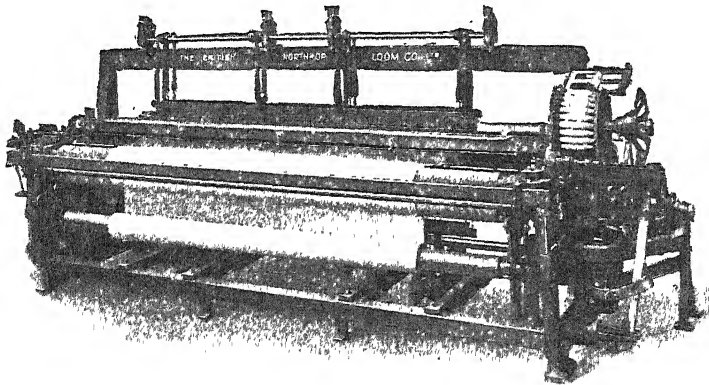
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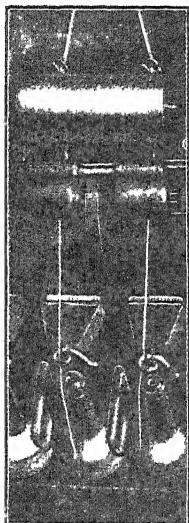
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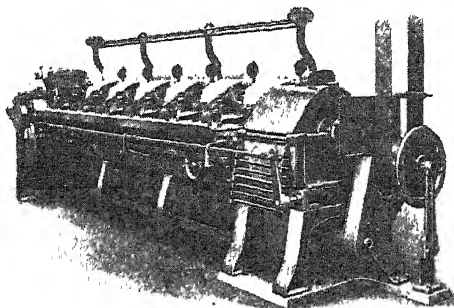
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IMPROVED COMBER, NASMITH TYPE

- (e) Sharp filling (weft) fork and grate.
- (f) Crooked-running shuttle.
- (g) Shuttle spindle sharp.
- (h) Binder rubbing on box bottom.
- (i) Bobbin jumping up in shuttle, due to loose shuttle spring.
- (j) Selvedge too tight.
- (k) Temple striking reed.
- (l) Lay having too much sideways play will cut filling (weft) at grate.
- (m) Badly worn binder pin or pin hole.

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### FABRIC TESTER.

---

A new cloth-strength tester has been placed on the market by Messrs. Henry L. Scott & Co., Providence, R.I., U.S.A. It is also very suitable for knit goods, as it stresses the fabric in all directions at the same time. In principle the action consists of pushing a ball-shaped plunger through a fabric held across a steel ring.

The fabric is clamped between two steel rings which force the ball-shaped plunger downwards, and so pulls inclinable weights upwards. Finally, the fabric gives way and the plunger passes through it. The result of the test is shown on the dial of the machine or on a recording chart. Both the stretch and the strength of the cloth can be determined.

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### LONG DRAFTS.

---

*The Textile World* (U.S.A.) publishes an account of a simplified system of long drafting placed on the market by Belger & Co., Newton, Mass.

The elastic top roller settles down on the lower roller in the manner of a balloon tyre on the highway, and gives an extended nip which serves to control the fibres as they are pulled through by the front rollers.

The "Elastix" roller, as the new middle top roller is called, consists of a metal arbor surrounded by a para-rubber cushion having air pockets running the length of the boss. The walls of these air pockets are at such an angle to the radius of the roll that they easily give back when pressure is applied to the surface of the roll. The rubber is completely covered by a calf-skin cover. The result of this construction is a very soft and elastic roller which is easily depressed by a slight pressure, but which readily regains its shape when the pressure is released.

Not only does this flexibility afford a longer nip, but it also permits the roller to sink down on each side of the stock more completely and therefore hug the fibres more snugly. The lengthened nip brings the bite one-quarter inch nearer the front roll, and is claimed to afford an unusually efficient slip draft. A good substantial break draft between the back and middle rollers

is also claimed. The average staple of cotton to be spun is held firmly; and, owing to the reduced measurement of the bite between the rollers, the shorter stock is held while the few longer fibres slip through.

Among the advantages claimed for the Elastix roller long-draft system are simplicity of application and operation, comparatively low cost, elimination of some preparatory machinery, and the production of an even and strong yarn.

## LOOMS PER TACKLER IN U.S.A.

The number of looms that one fixer (tackler) can handle on cotton goods depends, of course, upon the looms themselves, the kind of goods being woven, and whether or not the loom-fixer has helpers, a change-over, a man to tie in the warps, etc.

When one of the labour union organizers was in a New England city recently trying to form a loom-fixers' union, the reorganizer stated the loom-fixers in that city were doing too much work because, he said, in one mill the fixers were tending ninety looms. One of the loom-fixers in the audience got up and laughed at the organizer and said that he tended 135 looms, and on the night run the fixers in his own mill tended as high as 212 looms.—(*American Wool and Cotton Reporter*.)

## SCORCHING TEMPERATURES OF TEXTILES.

It has been a commonly accepted fact that cotton cloths would launder better than cloth made from any of the other fibres. It is not generally understood why cotton fibres would stand the abuse that will disintegrate other fibres.

One of the factors that makes cotton excel in ordinary use is brought out in a report by the Laundryowners' National Association. This report shows that cotton will stand considerably more heat in ironing before scorching than any of the other fibres.

Textile material	Time on contact in seconds.		
	One	Two	Five
Cotton ... ..	510° F.	487° F.	442° F.
Viscose rayon ... ..	463	—	375
Linen ... ..	447	425	403
Unweighted silk ... ..	447	425	403
Wool .. ..	397	375	350

The results of this investigation are summarized as follows:—

1. There are any number of scorching temperatures, depending upon conditions.

2. The two main factors of control are the temperature of the iron and the length of exposure.

3. The amount of moisture present has a distinct bearing upon the problem.

4. Although equal intensity of scorch has been reported to be accompanied by an equal tensile strength loss after a 30-second exposure at elevated temperatures, no such relationship was

observed after exposures up to 5 seconds, even though the scorching was noticeable.

5. Hand ironers were found to prefer an electric iron having a temperature range between  $345^{\circ}$  and  $495^{\circ}$  F.

6. Operators were observed to turn off the current when pressing damp and heavy nurse uniforms, etc., to avoid surface scorching. A temperature of  $420^{\circ}$  F. was preferred for this type of work.

7. Wool was found to be the most susceptible of all fibres to scorching or yellowing, and cotton the least.

8. Viscose rayon, linen and unweighted silk fall between wool and cotton as far as scorching is concerned.

9. Cellulose-acetate rayon sticks to the iron at too high a temperature and actually melts. "Iron-proof" cellulose-acetate is far more resistant to melting.

10. The following limits of ironing temperatures are recommended for automatic electric irons used under power laundry conditions:—

(a) Wool and Celanese,  $340^{\circ}$  to  $400^{\circ}$  F.

(b) Cotton, linen, rayon and washable silks,  $435^{\circ}$  to  $495^{\circ}$  F.

*(National Association of Cotton Manufacturers.)*

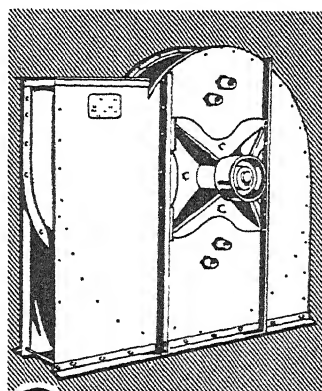
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## The French Cotton Industry.

A very instructive contribution to the cotton literature has been made by Mr. J. R. Cahill, C.M.G., in his report on the economic conditions in France in 1928, published as one of the regular reports of the Department of Overseas Trade and obtainable at 5s. from H.M. Stationery Offices, London and elsewhere.

### MACHINERY EQUIPMENT AND PRODUCTION OF THE FRENCH COTTON INDUSTRY.

The French cotton industry, which ranks third in the world after those of Great Britain and of the United States, has 9,774,000 spinning spindles in operation in 1928, an increase of 207,000 on the figures for 1927, of 258,000 on those for 1926, and of over 2,000,000 on those for 1913 within French pre-war frontiers. In addition, France now operates 1,440,200 doubling spindles, 191,800 power looms and 268 printing machines (1,160,000 spindles, 141,000 looms and about 120 machines in 1913). The industry gives occupation to 195,000 workers, of whom 63 per cent. are women. Of the total, 110,000 are stated to be occupied in power-loom weaving factories. The French Cotton Federation estimates at 229,000 tons (3.82 per cent. less than in 1926) the national production of yarns in 1927, and at 1,239 million metres (7.46 per cent. less than in 1926) the production of piece goods.

### GEOGRAPHICAL DISTRIBUTION AND CHARACTERISTICS.

Cotton spinning and twisting is carried on in four principal areas: in the east with main areas of the Vosges and Meurthe-Moselle (3,100,000 spinning and 120,000 doubling spindles), in Alsace (1,900,000 and 112,000), in the Lille area (1,500,000 and 640,000), in the Roubaix-Tourcoing-Armentières area (1,250,000 and 245,000), and in the Normandy and west (1,570,000 and 96,000). The mills of St. Quentin, Amiens, the Lyons and Rhône, and other areas show a combined total of 400,000 spinning and 30,000 doubling looms. Cotton weaving is concentrated in four main areas: in the east (Vosges, Epinal, Belfort, etc.) with 70,000 looms, in Alsace (Mulhouse) with 40,000, Normandy (Rouen) and the west (Cholet, etc.) with 33,000, and in the Lyons and Rhône areas (Roanne, Tarare, Amplepuis, etc.) with 50,000 looms. Little cotton weaving is done in the great textile district of the north, under 4,000 looms being found in the Lille-Roubaix-Tourcoing-Armentières area; at St. Quentin, however, are nearly 8,000 (of which 3,000 hand looms largely in the embroidery, guipure and similar manufacture), and 4,000 to 5,000 at Amiens (in the fustian or corduroy manufacture). Cotton printing is centred in Alsace (e.g., Mulhouse), which operates about 156 out of the total; the Vosges at Epinal and Thaon (about 30), and in the Rouen area (about 70). Dyeing and bleaching for the whole industry is practically conducted by one concern, which has a dozen works in various centres, and has heavy participation in half a dozen others. In the northern and Alsatian regions the cotton factories tend to be situated principally in the larger urban centres; but in the Norman and western, in the Vosges-Epinal and Belfort areas, they are mainly in rural sites or on the outskirts of big towns (e.g., of Rouen and of Epinal).

## BUSINESS ORGANIZATION.

The French cotton-spinning and weaving industries are still conducted on a comparatively small scale. There are over 600 firms; a very large number of spinners is stated to have less than 30,000 spindles, and of weavers to have less than 600 looms. Firms have retained to an immense extent the family character. Before the war only about 3 per cent. of textile concerns possessed company form; about 15 to 20 per cent. are now stated to possess this form, but as the change has often been made in recent years for fiscal purposes, the new form has not much altered the essential family character. The general level of the units has certainly become larger since the war. The war-damaged and subsequently reconstructed and re-equipped factories contained 40 per cent. of the total spindles, and 15 per cent. of the total looms; and not only in their case but in that of the factories outside the war areas, the units and their equipment have been enlarged and generally modernized. Amalgamations have been, however, relatively few; factory specialization of production (e.g., to a very few counts, to a very few kinds of fabrics) has been rare; but the increased attention given to African and Eastern native markets, and the influence of Alsatian example, are, however, hastening a movement in this direction. A further characteristic of the French cotton industry is the high degree of identity between master spinner and weaver; according to the director of the French Cotton Federation, already in 1923 nearly half of the spindles and of the looms were united among spinners-weavers (40 per cent. of existing spindles were held by the same manufacturers as held 46 per cent. of total looms).

The same authority recently stated, as regards the commercial side of organization of production, that little advance had occurred. "There has been created, especially since the war, a certain number of groups that centralize for selling purposes the output of several factories, but, as regards spinning and weaving, generally speaking, no important working agreements have been formed (save for certain classes of threads not falling into the ordinary classes), for the purpose either of the distribution of the production of different counts or of different varieties of fabrics, or for the apportionment of markets, or for the regulation of prices. Many obstacles have hitherto stood in the way. The spinning and weaving undertakings are too numerous; their output is subdivided in a range of articles far too various; the spirit of the textile manufacturers is still too impregnated with individualism owing to the long tradition of their family undertakings for such methods yet to be practically and morally realizable. It is possible that under the pressure of rather severe industrial crises, cotton manufacturers may be gradually obliged to give up an individualism which is occasionally anarchic, and which does not always serve their interests. But the progress to be secured in this direction is bound to be rather slow, and must probably, if the occasion arises, be precluded by regional solutions covering certain well-defined articles."

## CONDITIONS IN 1926-27.

In 1927 production was somewhat lower than in the previous year, that of yarn falling by 3.82 per cent., and that of piece goods by 7.46 per cent.; in 1926 the output was 23,800 tons of yarn, and 13,400 thousand pieces of fabrics; in 1927, 22,900 tons, and 12,386 thousand pieces. Home trade was less active, partly owing to the large purchases of the population in 1926, when people bought far in excess of immediate requirements on account of the then rapidly depreciating franc, but export trade was very active, an increase of 327 per cent. having occurred in 1927 in exports of cotton yarns, and of 27 per cent. in those of cotton piece goods to foreign countries. This increase, however, is attributed to the desire to find an outlet abroad for a production, which was artificially maintained at a level very much above home consumption, in order not to dismiss their operatives and to reduce unemployment to a minimum. Orders began to come in from middlemen only towards the end of 1927, on account of the fall in the price of raw cotton during the last four months of the year, and rather to meet day-to-day requirements than to reconstitute stocks. Even in the case of so important a market for French cotton goods as Indo-China, the stocks which were accumulated by importers in 1926 and the first half of 1927 have been very gradually realized, with the result that for 18 months trade with the colony has been dull.

## RECORD EXPORTS.

Exports of cotton manufactures in 1927 amounted to 78,420 tons, and exceeded by 11,000 tons the previous record figures (67,130 tons) for 1924, and by 23,000 tons those of 1913. Their value at 3,456 millions was also unprecedented, was 144 millions more than in 1926 (3,312 millions), 923 more than in 1924, and nearly ten times that of 1913 (3,456 against 385 millions). Cotton yarn exports were far more remarkable; 30,400 against 7,100 tons in 1926. No figures are available for 1913, but for the years 1919-25 these exports were respectively 7,900, 8,100, 16,700, 15,200, 8,300, 16,000 and 10,300 tons. Great Britain largely increased her imports of French cotton manufactures, of which she took 4,000 tons, in comparison with 2,800 tons in both 1926 and 1925, and 1,600 tons in 1924; as to yarns, British imports in 1924-27 were respectively 3,560, 3,240, 4,568 and 2,024 tons. As a customer for French cotton manufactures, she was only surpassed in 1927 by Algeria (15,600 tons), Germany (12,900 tons), and Indo-China (9,900 tons). Exports to the last-named colony were lower than in 1926, but to Algeria they were higher, and there was a striking expansion, no doubt as the result of the Franco-German commercial agreement of August, 1927, in sales to Germany, which increased her imports of issues from 1,180 to 12,920 tons (or nearly 50 per cent. of all French exports) and of yarns from 680 to 14,936 tons. Other good customers were Belgium, following closely on Great Britain, the United States, Argentina and Switzerland among foreign countries, and Tunisia and French West Africa among overseas possessions. There was also a decided rise in exports of yarn to Belgium (from 1,560 to 4,290 tons), Holland (from 52 to 4,438 tons), and Switzerland (830 to 1,570 tons).

## REDUCED IMPORTS.

Simultaneously with this remarkable expansion in cotton exports there has been consistent reduction in imports. In view of the importance of the Lancashire cotton trade it is worth setting side by side the totals and the British shares thereof in 1913 and from 1918 to 1927. Cotton yarn in 1926 reached the unprecedented total of 9,200 tons owing to the great home demand for goods in that year.

## FRENCH IMPORTS OF COTTON YARN AND PIECE GOODS, 1913 AND 1918-1928.

Year	Yarns		Piece Goods	
	Total	From Great Britain (Metric Tons)	Total	From Great Britain
1913 .. .. .	3,122	2,147	4,820	2,375
1918 .. . . .	31,559	27,014	40,730	29,380
1919 . . . . .	31,109	25,908	24,070	15,011
1920 .. . . .	16,530	7,683	13,729	7,810
1921 . . . . .	2,969	1,491	3,419	1,478
1922 .. . . .	3,991	2,411	3,485	2,320
1923 .. . . .	5,346	3,584	2,956	1,746
1924 . . . . .	4,179	3,585	2,870	1,675
1925 . . . . .	4,035	3,240	3,129	2,066
1926 . . . . .	9,200	4,569	2,647	1,740
1927 .. . . .	2,604	2,024	1,284	935
1928 (6 months, ..	1,195	1,142	799	438

## SUPPLIES OF RAW COTTON.

France absorbs some 350,000 tons of cotton a year, of which in 1926 less than 2 per cent. was obtained from her overseas possessions, 65 per cent. from the United States and the rest from Egypt and British India. In 1927, out of 355,000 tons, the United States supplied 243,000, Egypt 40,500 and British India 26,000 tons. The dependence of France on foreign countries, and particularly on the United States, for her supplies of raw cotton led to the foundation in 1904 of the Colonial Cotton Association, which with the assistance of the cotton industry, and, since March, 1927, of a special tax of Fr.1 per 100 kilos. gross on imported cotton, has been

endeavouring to foster cotton growing in French colonies. The need appeared more pressing as the result of the decline in American cotton harvests from 1914 to 1923 (in 1923-26 these harvests were abundant). The national policy of development of the French colonies is lending additional force to the cotton-growing movement. Some progress has already been made, since in 1926 French colonies and protectorates supplied more than 6,000 tons of cotton to France, or nearly nine times as much as in 1913 and three times more than in 1923. The territories which appear most promising for the purpose are French West Africa, Algeria, Morocco, Indo-China, the New Hebrides and Syria. French West Africa is considered a particularly good field, not only for wet cotton growing but also for an improvement in the dry methods already employed by the natives, more especially as it can produce the middling-staple cotton, which accounts for three-quarters of the requirements of the French industry.

The following table shows the development of the exports of cotton from French colonies and countries under French mandate from 1922-26. It is officially stated that the harvests of 1926-27 were not good, and that the fall in world prices caused the natives in some colonies not to sell their crops. It is likewise stated that local industries absorb a portion of the output, and that notably in West Africa some weaving factories have been established :—

EXPORTS OF COTTON FROM FRENCH COLONIES AND COUNTRIES  
UNDER FRENCH MANDATE FROM 1922-26.

		(Metric Tons)				
		1922	1923	1924	1925	1926
Senegal	.. .. .	95	383	1,008	755	1,453
Soudan	.. .. .	31	140	84	—	36
Guinea	.. .. .	37	237	66	222	108
Ivory Coast	.. .. .	67	198	263	592	1,369
Dahomey	.. .. .	276	314	321	681	1,024
Total for French West Africa		506	1,272	1,742	2,250	3,990
Syria	.. .. .	750	1,800	2,000	3,070	1,700
Algeria	.. .. .	227	133	681	729	1,320
Togoland	.. .. .	678	766	998	1,602	1,231
New Caledonia and New Hebrides	.. .. .	117	111	113	268	318
Guadeloupe	.. .. .	9	2	5	27	41
Oubangui-Chari	.. .. .	—	—	—	2	93
General total	.. .. .	2,287	4,084	5,039	7,957	8,693

TRADE ORGANIZATION.

In July, 1927, a bank was founded, under the title of the Banque Cotonnière, by a group of French cotton manufacturers, with the financial support of the Banque de Paris et des Pays Bas. The object of the new bank, which has an initial capital of Fr.10,000,000, is to finance direct purchases of cotton in producing countries, particularly from the American farmers' co-operative societies. In 1924 was founded, aided by a loan of 5,000,000 from the State, the Comptoir Cotonnière Français, under the auspices of the Central Federation of the Cotton Industry. It then grouped 154 manufacturers in the spinning, weaving, bleaching, dyeing and printing branches for export trade purposes; each was stated to engage to earmark if required a proportion of his output for disposal by the Comptoir, which was not to trade with Algiers, Tunis or other French territory with the same tariffs as France. Offices were established at the chief cotton centres. For general purposes the central organization is the Federation or Syndicat Général de l'Industrie Cotonnière Française, which has a number of district groups (Norman, Vosges, &c.). The workers' organization is not strong, partly because the trade is widely scattered and has a large proportion of its factories in country districts; partly because about two-thirds of the workers are females, who tend less readily to join trade unions. Good

relations have existed for many years between masters and workers. Wages have usually been adjusted on the sliding scale principle, in keeping with the cost of living indices. The family allowance system has also tended to promote peace. Information as to the hours and wages in the textile industries will be found in the appropriate section of this report.

FRENCH IMPORTS OF COTTON YARN AND CLOTH FOR 1913 (EXCLUDING ALSACE-LORRAINE), 1924 TO JUNE, 1928.

(Expressed in Metric Tons.)

		1913	1924	1925	1926	1927	Jan to June, 1928
Cotton Yarn	..	3,128	4,179	4,035	9,200	2,604	1,195
Cotton Fabrics	..	4,280	2,870	3,130	2,647	1,285	799

FRENCH EXPORTS OF COTTON YARN AND CLOTH FOR 1913 (EXCLUDING ALSACE-LORRAINE), 1924 TO JUNE, 1928.

(Expressed in Metric Tons.)

		1913	1924	1925	1926	1927	Jan. to June 1928
Cotton Yarn	..	8,448	16,024	10,366	7,142	30,474	13,944
Cotton Fabrics	..	55,355	67,132	55,407	61,350	78,420	36,536

We take from a report by the U.S. Trade Commissioner, W. L. Finger, Paris, the following tables:

ACTIVITY OF FRENCH COTTON-SPINNING MILLS.

Period	Average per spinning spindle				
	Pro- duc- tion	Deliv- eries	Stocks not billed	Orders not filled	Orders booked
	Kilos	Kilos	Kilos	Kilos	Kilos
December, 1913	3,221	3,277	2,626	13,587	2,490
Monthly average					
1921	1,453	1,384	2,353	4,354	1,091
1922	1,945	1,962	1,433	5,396	1,662
1923	1,964	1,921	1,320	4,517	1,656
1924	1,922	1,932	1,227	5,960	1,998
1925	2,002	2,317	995	7,745	1,838
1926	2,064	2,016	1,023	7,384	1,563
1927—First quarter	1,955	1,686	2,019	6,487	1,686
Second half	1,977	2,007	2,318	6,053	1,772
1928—First half	2,111	2,128	2,185	6,706	2,141

FRENCH EXPORTS OF COTTON YARN BY CLASSES AND PRINCIPAL COUNTRIES OF DESTINATION.

Class and country of destination	Calendar year		First six months	
	1926	1927	1926	1927
	Metric tons	Metric tons	Metric tons	Metric tons
Cotton yarns, single:				
Unbleached	1,109	19,426	5,907	8,423
Bleached	155	102	62	47
Dyed or printed	329	411	193	225
Glazed or mercerized	45	54	22	25

## FRENCH EXPORTS, Etc —continued

Class and Country of destination	Calendar year		First six months	
	1926	1927	1926	1927
	Metric tons	Metric tons	Metric tons	Metric tons
Cotton yarns, ply:				
Unbleached .. .. .	1,013	4,554	1,364	1,883
Bleached .. .. .	855	820	398	350
Dyed or printed .. .	2,316	3,196	1,802	1,564
Glazed or mercerized .. ..	1,300	2,411	1,028	1,419
Total .. .. .	<u>7,122</u>	<u>30,974</u>	<u>10,776</u>	<u>13,936</u>
Exported to:				
Argentina .. .. .	508	684	405	315
Belgium and Luxemburg .. .	1,560	4,291	1,698	1,833
Czecho-Slovakia .. ..	71	90	5	140
Germany .. .. .	683	14,936	4,693	6,603
Greece .. .. .		205	147	54
Italy .. .. .	20	40	9	53
Netherlands .. .. .	52	4,439	1,208	1,733
Poland .. .. .	149	406	207	306
Spain .. .. .	167	230	74	125
Switzerland .. .. .	832	1,568	747	835
United States .. .. .	361	331	183	198
Yugoslavia .. .. .	54	102	53	65
Algeria .. .. .	240	202	94	179
French Indo-China .. ..	98	165	55	91
French West Africa .. ..	468	536	220	274
Tunis .. .. .	142	181	91	53
Other French colonies and protectorates	80	87	39	44
Other countries .. .. .	<u>1,637</u>	<u>2,481</u>	<u>848</u>	<u>1,035</u>

\* Not separately shown

## VALUES OF FRENCH EXPORTS OF COTTON MANUFACTURES, OTHER THAN YARNS, WEARING APPAREL, AND OTHER READY-MADE ARTICLES.

Country of destination	Calendar year		First six months of	
	1926	1927	1927	1928
	1,000 francs	1,000 francs	1,000 francs	1,000 francs
Argentina .. .. .	134,917	133,302	74,553	60,152
Belgium and Luxemburg .. .	236,243	183,586	101,541	90,336
Germany .. .. .	61,359	390,402	133,798	189,256
Great Britain .. .. .	209,405	408,147	187,366	115,988
Netherlands .. .. .	37,634	39,794	26,397	30,149
Switzerland .. .. .	91,292	160,236	58,919	112,305
United States .. .. .	239,859	238,012	112,968	95,122
Algeria .. .. .	535,156	597,059	274,901	189,725
French Indo-China .. ..	445,775	332,192	172,783	99,883
French West Africa .. ..	142,371	76,101	35,322	36,825
Madagascar and dependencies ..	153,735	135,683	58,933	76,332
Morocco .. .. .	69,799	38,151	18,502	20,556
Tunis .. .. .	158,422	102,740	59,350	36,984
Other French colonies and pro- tectorates .. .. .	97,886	89,293	45,430	35,267
Other countries .. .. .	<u>698,339</u>	<u>531,749</u>	<u>258,840</u>	<u>245,134</u>
Total, in thousands of francs	<u>3,312,192</u>	<u>3,456,447</u>	<u>1,619,603</u>	<u>1,434,014</u>
Total, in thousands of dollars	<u>\$129,175</u>	<u>\$134,801</u>	<u>\$63,165</u>	<u>\$55,927</u>

Codes Used—A B C, Western Union, Bentley's and Lieber's.

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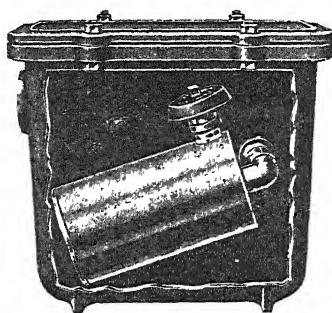
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## Problems of the U.S.A. Cotton Industry in New England.

---

A luncheon conference was recently arranged in New Bedford, Mass., at which Mr. Ward Thoron, treasurer of the Merrimack Manufacturing Company and President of the Arkwright Club, spoke on the urgent need for changing the Sherman Act, in order to allow the American cotton industry to co-operate more closely with a view to obtaining stable prices and to undertake co-operative marketing. The speaker also insisted upon higher import duties on yarns above 40's and on cloth made out of such yarns. Mr. Thoron also advocated the selling abroad of seconds, irregulars and end-of-season surplus of style goods by means of a co-operative export association, in order to prevent prices in the domestic market being ruined by the sale of such goods.

Mr. Robert Amory, of Amory, Browne & Co., Past President of the National Association of Cotton Manufacturers, gave the following address:—

Is the manufacture and consumption of cotton cloth increasing or decreasing? Our authority is the U.S. Bureau of the Census, who compile every two years the production of cloth and every year the consumption of cotton. A careful study of these figures shows that the average production of cotton cloth for the five years ending in 1911 to have been at the average rate of 5,460,000,000 square yards, and for the five years ending in 1927 at the average rate of more than 8,000,000,000 square yards.

### CONTINUED INCREASE IN PRODUCTION.

This is an increase of 46·8 per cent., or 2·9 per cent. per year. The population of the United States in the last 16 years increased only 24 per cent., or 1½ per cent. per year. Therefore, the production and consumption of cloth has increased more rapidly than the population. Furthermore, in no year of the past three up to 1928 has production declined. In 1927 production increased 10·1 per cent. over the previous year. Therefore, this present year, 1928, does show the first decline since 1924. It now appears as if 1928 would decline 5 per cent. from 1927, but 1928 shows the second largest production in the history of the United States except for the two war years 1917 and 1918, which were only slightly larger.

These figures are indisputable as to the size and growth of the markets for cotton cloth. It must be remembered that many new uses for cotton cloth have sprung up and many lines have increased very rapidly; to mention but a few, automobile tyres and body fabrics, sheets and pillow cases and towels.

### RAPIDLY GROWING CONTINUOUS OPERATION.

Now as to the question of overcapacity of machinery. In 1909 there were 28,000,000 spindles in place. To-day there are 35,000,000 but only 30,000,000 were active last month. These figures do not show too great an expansion in machinery. The spindle-hour figures do show that continuous or two-shift operation is a rapidly growing factor in the business. The lower-cost producing mills, by operating two or more shifts, are obtaining more than their share of the business from higher-cost mills or localities which now have machinery stopped or on part time. Furthermore, it might well be recognized that every developed and fairly established industry must have some excess machinery capacity to take care of periods of large demand, seasonal and otherwise. No such industry can expect to run steadily full all of the time.

## PROFITS MOST UNSATISFACTORY.

Profits are most unsatisfactory. There are many evidences of this lack of dividends, lack of new construction. The changing location of the industry and the diversity in the costs between different mills and localities account for a large part of this. The industry is highly competitive—no corporation or group control as much as 5 per cent. of the output.

The industry's raw material, cotton, has a world market price known to everyone. The buyers of its products can and do combine to force prices down and make more and more burdensome demands, while by the Sherman and Clayton Acts the mills cannot combine to resist.

## MILL GETS SMALL PART OF CONSUMER'S DOLLAR.

The cost of distribution of cotton cloth after it leaves the mill is very high. The largest part of this cost is that of retailing, which is about 31 cents in every consumer's dollar, while after the mill pays for its cotton it receives only 15 cents out of each consumer's dollar for manufacturing the grey goods. For example, on a yard of combed broadcloth made here in New Bedford a mill receives for its manufacturing only from 8½ to 9½ cents for carding, combing, spinning and weaving 4½ miles of yarn into cloth. Out of this 8½ to 9½ cents they must pay wages, taxes, light, heat, power, repairs, interest, depreciation of machinery and rent in the form of dividends to the stockholders, although few pay any such rent or dividends. The retail cost of cutting off and selling the finished yard is about twice as much, or 16½ cents. This example is given to show that the mills and their workers have reached a fairly high state of efficiency—a very high state as compared with other industries, and especially with distribution systems. Purposely, the example is selected where there exists little or no profit to any of those engaged.

## NO PANACEA FOR THIS CONDITION.

However, changes in such matters can come but slowly, and with difficulty. In time, mills may get more of the consumer's dollar through distribution becoming more efficient and economical. In the meantime, no panacea exists, such as the mills taking over other functions such as finishing and converting, or even retailing. It should be obvious that mills, not knowing these other businesses, could not easily run them any more economically than they are at present being run. At present these distribution agents are not making large profits out of cotton goods. The Department of Commerce is making studies of waste in distribution which it is to be hoped will be pursued further and more rapidly. It does seem the mills should not be forbidden by the Sherman and Clayton Acts from agreeing for the purpose of resisting the pressure of buying groups who are formed to force still lower the mills' meagre margin.

## SHOULD SEE WHAT CAN BE DONE.

To sum up: The United States domestic market for cotton cloth is very large and constantly expanding. Those mills and localities which are suffering for lack of business should recognize the facts and see what can be done to obtain their share of a great and growing market.

Mr. Abraham Binns, Secretary of the New Bedford Weavers' Union and Treasurer of the New Bedford Textile Council, then addressed the meeting in the following terms:

Directly, it would be hard to prove that the tariff fails to protect New England textiles in competition with those imported. Indirectly, the tariff of late years has tended to the disadvantage of New England in competition with other sections of the country.

## TARIFF AND STANDARD OF LIVING.

The reason why such a large proportion of the electorate of the country supports a highly protective tariff is because of their belief that it is the means of procuring to the American working men and women a higher standard of living than obtains in competing countries. Does the tariff accomplish this end in the case of the American textile operative? Viewing the cotton industry as a whole, and taking all factors into consideration, it is very doubtful if the American operative has as bearable a life as the operative of the chief European competing countries.

The experience of the last six years under the Tariff Act of 1922 demonstrates that the fixing of a high schedule rate of duties in the cotton industry is of itself insufficient to protect the standard of living of the operatives. The tariff, which is designed, so we are often told, chiefly to protect the workers, ought at least to give the American operatives conditions equal to the best conditions prevailing in the industry in the competing foreign countries. This the present Act does not do.

#### WAGES AND HOURS OF LABOUR.

The oft-reiterated statement that the American cotton textile operatives earn so much more wages than the foreign operatives does not tell the true story. Wages are comparative, and are governed to a large extent by the cost of living in a locality. In the case of foreign countries where the operatives are protected against old age, sickness and unemployment, comparison is difficult. The hours worked per week and the conditions on the job are the true basis of comparison.

In Great Britain the work week in the textile industry is 48 hours, with no night work. In Massachusetts we have mills that run nights and work their men operatives 14 hours a night, five nights a week. In the South and some of the New England States the mills run from 54 to 60 hours per week daytime, and in many instances run night shifts comprising both men and women.

These mills are a greater menace to the American standard of living than any competition from foreign countries. They set a pace of competition which, if continued indefinitely, can only end in disaster to all concerned in the industry. They flood the market with goods produced under worse conditions than prevail in any other country of the first rank.

At present the tariff, as a means of protecting the wages, hours and conditions of the cotton textile operatives, is a complete failure. The scope of the Tariff Act ought to be extended and contain specific provisions that the conditions under which the American textile operatives work shall at least be equal to the best conditions prevailing in competing countries.

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### U.S.A. AND THE 48-HOUR WEEK.

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During a recent conference between the New Bedford Cotton Manufacturers' Association and Massachusetts Congressmen and Senators, Mr. John Sullivan, the President of the Association, said, with reference to the 48-hour Law:—

“ It seems unfortunate that with the unparalleled prosperity of our great country an industry such as ours should be suffering difficulties the greatest in its history. While the depression in our industry is world-wide, it is more in our State than in any other part of the country. Why Massachusetts is feeling the depression more than any other State is due largely to the fact that we have a 48-hour law on our Statute Books, while competing plants in other States are allowed to operate 54 hours and upward. The imports of fine cotton goods are very great, practically all of which could be manufactured in New Bedford. A slightly higher duty on these goods would result in more business for American mills.” . . .  
“ The total cost of print cloth 20 years ago was about 14 cents per pound. To-day the labour cost alone is 16 cents a pound or more, and the total price is around 40 to 41 cents per pound.”

Mr. Sullivan was asked if the solution for the industry did not lie in the direction of greater exports, and he replied that the cotton manufacturers were heartily in favour of further exports and were trying to develop that field more than ever before.

## AVERAGE EARNINGS IN THE U.S. COTTON INDUSTRY.

The accompanying table, showing wages in the cotton industry, indicates that wages in the New England States have varied very little in the last two years, while there has been a distinct tendency for wages in the cotton-growing States to increase.

The average wage per hour in New England decreased less than a cent (.006), while in the cotton-growing States there was an increase of  $1\frac{1}{2}$  cents per hour.

The actual wage per week in the cotton-growing States is shown still to be appreciably less than in New England. On the basis of 48 hours per week in New England and 55 hours per week in the cotton-growing States the actual difference in earnings has decreased from \$5.68 in 1926 to \$4.59 in 1928.

In presenting these figures the Bureau of Labour Statistics does not attempt to define the size of the job or make allowances for any other than direct pay to employee.

### AVERAGE EARNINGS IN DOLLARS.

	AVERAGE PER HOUR.		Cotton-Growing States:	
	N E States: 1926	1928	1926	1928
Picker Tenders, Male	.377	—	.240	—
Card Tenders & Strippers, Male	.403	—	.253	—
Speeder Tenders, Male	.461	.455	.318	.319
Speeder Tenders, Female	.399	.381	.285	.294
*Spinners, Frame, Male	.407	.414	.197	.209
Spinners, Frame, Female	.360	.357	.230	.236
Slasher Tenders, Male	.529	—	.316	—
Loomfixers, Male	.624	.598	.405	.410
Weavers, Male	.478	.460	.331	.342
Weavers, Female	.438	.434	.300	.310
Average	.448	.442	.288	.303

	AVERAGE PER WEEK		Cotton-growing States on		Difference	
	N E on 48-hour 1926	basis 1928	55-hour 1926	basis 1928	per week 1926	1928
Picker Tenders, Male	18.10	—	13.20	—	4.90	—
Card Tenders and Strippers, Male	19.35	—	13.90	—	5.45	—
Speeder Tenders, Male	22.15	21.84	17.50	17.54	4.65	4.30
Speeder Tenders, Female	19.15	18.28	15.65	16.17	3.50	2.11
*Spinners, Frame, Male	19.50	19.87	10.85	11.49	8.65	8.38
Spinners, Frame, Female	17.25	17.13	12.65	12.98	4.60	4.15
Slasher Tenders, Male	25.40	—	17.35	—	8.05	—
Loomfixers, Male	30.00	28.70	22.30	22.55	7.70	6.15
Weavers, Male	22.95	22.08	18.20	18.81	4.75	3.27
Weavers, Female	21.00	20.83	16.50	17.05	4.50	3.78
Average	21.49	21.24	15.81	16.65	5.68	4.59

Source:—

1926—*Monthly Labour Review*, February, 1927.

1928—*Monthly Labour Review*, October, 1928.

\* Includes two cotton-growing States and three New England States  
† New England States included: Maine, New Hampshire, Massachusetts, Rhode Island, Connecticut.

‡ Cotton-growing States included: Alabama, Georgia, North Carolina, South Carolina, Virginia.

(National Association of Cotton Manufacturers.)

## India's Cotton Yarn and Cloth Imports, April 1st, 1927, to March 31st, 1928, and India's Mill Production.

Mr. Thomas M. Ainscough, C.B.E., M.Comm., H.M. Senior Trade Commissioner in India and Ceylon, has issued through the Overseas Trade Department his annual report, which, as its predecessors, contains much valuable information. We extract, in the following pages, the particulars relating to cotton yarn and cloth:—

### MANUFACTURED AND MAINLY MANUFACTURED GOODS.

#### COTTON TEXTILES.

*Yarns.*—The total imports of cotton twist and yarn showed a slight advance from 49,424,558 lbs. valued at Rs.662 lakhs in 1926-27 to 52,344,034 lbs. valued at 679 lakhs in 1927-28. The principal increases took place in bleached yarns (752,000 lbs.), coloured yarns (606,000 lbs.), and mercerised yarns (1,196,000 lbs.). Grey yarns advanced by only 378,000 lbs.

The following table gives the imports of grey yarns arranged according to counts:—

Counts	1926-27 lbs.	1927-28 lbs.
Nos. 1 to 10 . . . . .	105,860	316,433
Nos. 11 to 20 . . . . .	709,876	1,744,098
Nos. 21 to 30 . . . . .	430,723	398,432
Nos. 31 to 40 . . . . .	20,951,473	21,978,217
Above 40's . . . . .	6,965,572	6,414,918
Twofolds . . . . .	6,601,161	5,291,265
Total imports (grey) . . . . .	35,764,665	36,143,363

The remarkable increase of over a million pounds of grey 11's to 20's is almost entirely accounted for by increased shipments from Chinese mills at very low prices. The advance in 1's to 10's was also secured by China. The reduction in counts above 40's was suffered by Japan, the United Kingdom increasing her share of this trade by over 112,000 lbs. The reduction in twofold spinnings was borne by the United Kingdom and Japan.

*Note.*—Unless otherwise stated, the statistics in this section are drawn from the publications of the Department of Statistics, Government of India, and relate to imports on private account only. Since all Indian statistics are now given in rupees and not in sterling, and in view of the labour which would be involved in converting into sterling, the lakh of rupees (Rs.100,000 or £7,500 at 1s. 6d. exchange) has been taken as the usual unit. It is fully realised that this is not so convenient a unit as the £ sterling.

The next table sets forth the details of the imports of bleached yarns :—

Counts	1926-27	1927-28
Nos. 1 to 20	lbs	lbs.
Nos. 21 to 30	Not	4,658
Nos. 31 to 40	separately	79,134
Above 40's	recorded	1,266,952
Twofolds	prior to	1,037,087
	1927-28	2,405,281
Total imports (white)	4,061,521	4,813,112

The whole of the imports of 31's to 30's were drawn from the United Kingdom. Of 31's to 40's the United Kingdom supplied 1,171,872 lbs. and Japan 94,000 lbs. The counts above 40's were also drawn almost exclusively from the United Kingdom. Twofolds were obtained from the United Kingdom (1,550,000 lbs.), Japan (774,000 lbs.), and other countries (82,000 lbs.).

Coloured yarns were imported as follows :—

Counts	1926-27	1927-28
Nos. 1 to 20	lbs	lbs
Nos. 21 to 30	252,280	399,425
Nos. 31 to 40	521,988	376,671
Above 40's	3,453,901	4,059,345
Twofolds	596,928	564,470
	544,921	576,079
Total imports (coloured)	5,370,018	5,975,990

The United Kingdom shipped practically the whole of the counts below 31's. Of 31's to 40's the United Kingdom supplied 2,647,000 lbs. and other countries 1,412,000 lbs. Above 40's the United Kingdom sent 434,747 lbs., and other countries 129,723 lbs. Twofolds were almost entirely drawn from the United Kingdom.

Imports of mercerised yarns were almost entirely confined to twofolds, the total imports of which amounted to 5,360,895 lbs. Japan supplied no less than 5,073,000 lbs. and the United Kingdom 286,665 lbs.

The sources of supply of yarns of all kinds were as follows :—

Country of origin	1926-27		1927-28	
	lbs	Rs (lakhs)	lbs.	Rs. (lakhs)
United Kingdom	20,016,156	3.08	20,559,141	3.09
Netherlands	486,435	9	587,965	9
Switzerland	691,130	10	484,059	6
Italy	313,612	4	425,256	6
China	945,032	8	12,866,303	1.20
Japan	26,619,033	3.20	16,974,830	2.24
Other countries	263,160	3	446,480	5
Total imports	49,424,558	6.62	52,344,034	6.79

The reduction in the imports from Japan has been equalized by increased imports from the China mills, which are mostly owned by Japanese companies. The British position is practically stationary.

The most noteworthy event of the year was the passing, in September, 1927, of the Indian Tariff (Cotton Yarn Amendment) Bill, which, consequent upon the report of the Cotton Tariff Board and as a measure of protection for Indian mills, substituted for the 5 per cent. *ad valorem* import duty on all cotton yarns an import duty of 5 per cent. *ad valorem*, or 1½ annas per lb., *whichever is the higher*. A study of the returns shows that the duty has had little effect on the imports of British yarns, which are usually counts of 40's and upwards of grey yarn and specialities which are of sufficiently high price that the 1½ annas per lb. duty is less than 5 per cent., and consequently the rate remains as before. The imports of yarn from China of counts below 40's has been phenomenal, but, as the

new duty was only in force for half the year, it is probable that an undue proportion of these were shipped in the first few months of the year in anticipation of the protective measure. Sir George Rainy, in speaking on the Bill on September 6th. 1927, briefly recapitulated the position in the following terms:—

"In the first place there are the higher counts, that is, everything above 40's, or at any rate above 50's. As regards these the effect of the duty must be very small. When you get to the really high counts, the 1½-anna duty is less than 5 per cent., and obviously, therefore, it cannot raise the price. When you come a little lower down, to the counts between 60's and 40's, the increase in the price will be quite small. As far as I can make out from the figures in the trade returns, between 50's and 60's, the 1½-anna duty would not be much more than 6 per cent., and between 40's and 50's perhaps 7 per cent. As regards the counts below 30's, there are good reasons for thinking that the price cannot rise very much, because the internal competition between the Indian mills on these lower counts is so severe—the total imports being only about 2,000,000 lbs. per year—that in all probability any rise in price which the duty might bring about would almost instantly be checked by an increase in the Indian production, which would bring down the price again. Finally, there are the medium counts from 31's to 40's, and here it seems likely that the duty might raise the price of yarn by almost the full amount of the duty. It is in respect of these counts that the Indian cotton mills stand to gain, and, to a limited extent, the handloom weaver stands to lose."

The production of the Indian mills, compared with the imports, is shown in the following statement:—

	Imports in lbs. (1,000)	Indian Mills Production in lbs. (1,000)
Annual average for the five years 1909-10 to		
1913-14 . . . . .	41,794	646,757
1923-24 . . . . .	44,575	617,329
1924-25 . . . . .	55,907	719,390
1925-26 . . . . .	51,688	686,427
1926-27 . . . . .	49,425	807,116
1927-28 . . . . .	52,344	808,911

The subjoined table compares by counts the quantities of imported cotton twist and yarn with the quantities produced in Indian mills:—

#### PRODUCTION OF INDIAN COTTON MILLS COMPARED WITH IMPORTS, SUBDIVIDED IN COUNTS

(For years ending March 31.)

	1913-14 (pre-war year).		1924-25		1925-26	
	Imports lbs. (1,000)	Pro- duction lbs. (1,000)	Imports lbs. (1,000)	Pro- duction lbs. (1,000)	Imports lbs. (1,000)	Pro- duction lbs. (1,000)
Cotton twist and yarn						
Nos. 1 to 20 . . . . .	1,254	492,693	7,170	469,810	4,772	444,748
Nos. 21 to 25 . . . . .	896	123,995	477	154,672	543	142,759
Nos. 26 to 30 . . . . .	3,686	42,999	934	69,140	575	71,029
Nos. 31 to 40 . . . . .	23,657	19,712	27,687	19,368	26,294	19,738
Above No. 40 . . . . .	7,859	2,699	7,659	5,822	6,685	5,834
Grey and coloured twofolds (doubles) . . . . .	—	—	5,833	—	6,195	—
White, unspecified descrip- tion and waste . . . . .	6,819	679	6,147	578	6,624	2,319
Total . . . . .	<u>44,171</u>	<u>682,777</u>	<u>55,907</u>	<u>719,390</u>	<u>51,688</u>	<u>686,427</u>

## COTTON MILL NOTES

	1926-27		1927-28	
	Pro-		Pro-	
	Imports lbs. (1,000)	duction lbs. (1,000)	Imports lbs. (1,000)	duction lbs. (1,000)
Cotton twist and yarn				
Nos. 1 to 20 .. .. .	1,068	515,681	2,465	494,788
Nos. 21 to 25 .. .. .	483	168,345	416	182,221
Nos. 26 to 30 .. .. .	470	79,966	439	80,839
Nos. 31 to 40 .. .. .	24,405	27,657	27,305	33,757
Above No. 40 .. .. .	7,562	11,531	8,039	11,142
Grey and coloured twotolds (doubles)	7,146	—	13,634	—
White, unspecified description and waste	8,291	3,936	46	6,171
Total .. .. .	49,425	807,116	52,344	808,911

The Bombay Mill strike started in April, 1928, and is therefore not reflected in these statistics.

It will be noted that the Indian mill production remained almost stationary, the increased output of counts above 20's being offset by a reduction in spinnings below 20's, which were driven off the market by imports from China, which were dumped into India at such low prices that competition became almost impossible. It will be interesting to see whether the additional protective import duty will suffice to protect the Indian mills against this competition after it has been enforced for a complete year.

The Bombay Mill Owners' Association, in their report for 1927, state that the year opened with a stock of 34,000 bales of yarn, the monthly average stock was 35,000 bales, and the year closed with a stock of 39,000 bales. They add that:—

“the position in the yarn market continued unsatisfactory throughout the year, the rise in the price of cotton not being followed by a proportionate rise in the price of yarns. How serious the position has been may be judged from the fact that the number of inactive spindles went on increasing practically from month to month, and at the end of the year over a fourth of the spindles on site were idle. In spite of this, the stocks with the mills at the end of the year stood at a higher figure than at any other period during the year under report. The prices of 10's and 20's yarns, which were 7 annas and 8½ annas a pound at the end of 1926, reached their highest in the middle of September with quotations at 10½ annas and 12½ annas a pound. The year closed with prices at 9½ annas and 11½ annas a pound, with very poor demand. For all counts of saleable yarn prices remained unremunerative more or less throughout the year.”

*Piece Goods*.—The following table shows the quantitative imports of the three main classes of piece goods for the last pre-war year and during the past four years:—

Year	Grey (unbleached) million yds.	White (bleached) million yds.	Coloured, Printed or Dyed million yds.
1913-14 .. .. .	1,534.2	793.3	831.8
1924-25 .. .. .	845.5	548.9	407.0
1925-26 .. .. .	709.1	465.1	365.8
1926-27 .. .. .	748.4	571.0	447.4
1927-28 .. .. .	875.5	556.5	504.8

The next statement gives the *value* of the three main classes in the last pre-war year and during the past four years :—

Year	Grey (unbleached)	White (bleached)	Coloured Printed or Dyed
* 1913-14 .. .	16,966,515	9,523,204	11,997,683
* 1924-25 .. .	18,992,655	13,487,904	13,343,973
† 1925-26 .. .	16,415,418	11,994,909	11,949,876
† 1926-27 .. .	14,712,768	13,220,371	12,916,839
† 1927-28 .. .	15,936,124	11,562,692	13,143,102

\* At exchange of 1.4

† At exchange of 1.6

The heavy fall in the values of bleached goods imported during the past year more than offset the slight increases in the grey and coloured varieties. The total yardage imported is still only 61 per cent. of that imported in 1913-14, but is 6 per cent. greater than in 1926-27 as a result of lower prices. The declared values per yard over the same series of years give the clue to the position, which is, briefly, that the falling-off in the imports of cotton piece good is in inverse ratio to the increase in their price.

	1913-14			1924-25			1925-26			1926-27			1927-28		
Cotton piece goods	Rs.	As.	P.	Rs.	As.	P.	Rs.	As.	P.	Rs.	As.	P.	Rs.	As.	P.
Grey (unbleached)	0	2	8	0	5	5	0	4	11	0	4	2	0	3	11
White (bleached)	0	2	11	0	5	11	0	5	6	0	4	11	0	4	11
Coloured, printed or dyed	0	3	5	0	7	10	0	6	11	0	6	2	0	5	9

#### VARIETIES OF PIECE GOODS IMPORTED

	1913-14 pre-war year million yds	1925-26 million yds	1926-27 million yds	1927-28 million yds
Grey (unbleached)				
Dhuties, saris and scarves .	806.1	430.1	471.6	527.6
Jaconets, madapollams, mulls, etc.	150.4	57.0	72.6	78.9
Longcloths and shirtings .	545.4	171.3	168.8	233.4
Sheetings .. .	2	30.4	18.3	23.0
Drills and jeans .. .	21.3	19.4	14.9	11.2
Other sorts .. .	10.8	9	2.2	1.4
Total .. .	1,534.2	709.1	748.4	875.5

	1913-14 pre-war year million yds.	1925-26 million yds.	1926-27 million yds.	1927-28 million yds.
White (bleached)				
Dhuties, saris and scarves ..	104.3	72.6	114.0	71.7
Jaconets, madapollams, mulls, etc.	307.9	186.8	234.8	224.5
Longcloths and shirtings ..	115.3	93.8	97.4	112.1
Nainsooks .. ..	204.7	77.0	65.9	93.0
Drills and jeans .. ..	5.7	6.1	5.1	6.9
Checks, spots and stripes ..	16.1	7.0	12.3	14.1
Twills .. ..	8.3	12.2	11.8	14.9
Other sorts .. ..	31.0	9.6	29.7	19.3
Total .. ..	793.3	465.1	571.0	556.5

## COTTON MILL NOTES

Coloured printed or dyed	1913-14	1925-26	1926-27	1927-28
	(pre-war year)			
	million yds	million yds	million yds.	million yds.
Dhuties, saris and scarves	115.2	29.9	35.5	38.4
Cambries, etc. . . . .	113.6	34.7	43.2	50.4
Shirtings . . . . .	152.6	72.5	90.8	88.7
Prints and chintz . . . . .	209.7	56.1	50.5	69.9
Drills and jeans . . . . .	30.0	32.4	11.9	64.2
Checks, spots and stripes . . . . .	19.7	10.7	17.0	18.4
Twills . . . . .	31.4	20.4	29.0	40.5
Other sorts . . . . .	159.6	109.1	136.5	134.3
Total . . . . .	831.9	365.8	447.4	504.8

The increase of 56,000,000 yards in the case of grey dhuties reflects the heavy purchases made in Manchester in December-January-February, 1926-1927, when the raw material stood at 6½d. to 7½d. per lb. Similarly the increased imports of grey shirtings, amounting to no less than 65,000,000 yards, are an eloquent proof of the fact that the scale of India's imports of piece goods are roughly in inverse ratio to their price. In December-January, 1926-27, when Manchester prices were at their nadir, qualities of grey shirtings were shipped which, owing to high prices, had not been purchased since the outbreak of war.

In white goods the reduction by 42,000,000 yards of the imports of white dhuties, saris and scarves is most marked, and is due to the transfer in the customs statistics from the beginning of August, 1927, of white yarn dhuties from the heading of white goods to that of grey goods.

The recovery in the imports of prints is encouraging, but the arrivals of these goods are only a third of pre-war quantities. Dyed drills and jeans and coloured twills show a satisfactory expansion.

## SOURCES OF IMPORTS.

(1) *Grey Goods* .—

Countries of consignment	1926-27		1927-28	
	yds	Rs. (lakhs)	yds	Rs. (lakhs)
United Kingdom . . . . .	588,781,340	15.24	651,160,996	15.54
China . . . . .	1,790,000	4	7,048,400	16
Japan . . . . .	154,865,422	4.23	214,773,511	5.46
United States . . . . .	2,690,128	10	2,241,237	7
Other countries . . . . .	283,886	1	313,773	1
Total imports . . . . .	748,410,976	19.62	875,537,917	21.24

The notable increase in the yardage from the United Kingdom is satisfactory so far as it goes, and represents the heavy purchases of grey dhuties and shirtings which were made during the first two months of 1927, when Lancashire cloth prices were low. Japan, however, improved her quantitative shipments to an equal extent, and the increase in the value of her shipments is remarkable, pointing to the fact that a greater

proportion of the higher qualities of grey goods was included. The increase in the shipments of grey shirtings, etc., from the Japanese mills in Shanghai, which represent the bulk of the imports from China, is noteworthy.

(2) *Bleached Goods.*—

Countries of consignment	1926-27		1927-28	
	yds.	Rs. lakhs	yds.	Rs. lakhs
United Kingdom ..	550,284,568	16.57	526,753,340	14.20
Netherlands ..	5,955,971	25	7,505,704	30
Switzerland ..	8,643,416	45	12,176,183	56
Japan ..	2,881,728	9	5,538,521	15
Other countries ..	3,185,854	16	4,428,544	20
Total ..	<u>570,951,537</u>	<u>17.32</u>	<u>556,462,292</u>	<u>15.41</u>

The British share of the value of the reduced trade declined from 95 per cent. to 92 per cent., while the Continent and Japan correspondingly increased their proportions. This apparent reduction, however, is entirely due to a change in the method of classification adopted by the customs authorities. As the Collector of Customs, Calcutta, states in his annual report: "The decline is due to the transfer in our statistics, from the 'white' to the 'grey' head, of unbleached cloth woven in Lancashire from white Egyptian cotton. This change was made under general orders from the beginning of August, and in the eight succeeding months 41,694,530 yards of these 'white yarn dhuties,' valued at Rs.1,10,25,006, have been shown as grey cloth in the Calcutta returns."

(3) *Coloured, Printed or Dyed.*—This heading is made up as follows:—

Description	1926-27		1927-28	
	yds.	Rs. (lakhs)	yds.	Rs. (lakhs)
Printed goods ..	176,854,152	6.13	235,343,234	7.53
Dyed goods ..	156,984,887	6.17	158,322,295	5.61
Woven coloured goods ..	113,603,188	4.92	111,175,803	4.38
Total imports ..	<u>447,442,227</u>	<u>17.22</u>	<u>504,841,332</u>	<u>17.52</u>

The improvement in the print trade is most satisfactory. The provenance of the imports was as follows:—

Countries of consignment	1926-27		1927-28	
	yds.	Rs. (lakhs)	yds.	Rs. (lakhs)
United Kingdom ..	318,300,188	12.58	352,210,938	12.59
Germany ..	3,022,526	20	2,644,414	18
Netherlands ..	13,697,487	75	12,069,810	61
Belgium ..	2,171,204	19	1,745,167	14
Switzerland ..	3,155,209	23	2,526,539	19
Italy ..	15,550,975	70	24,562,727	85
Straits Settlements ..	3,297,968	20	3,167,883	17
Japan ..	85,821,800	2.25	102,667,851	2.63
Other countries ..	2,424,780	12	3,246,003	16
Total imports ..	<u>447,442,227</u>	<u>17.22</u>	<u>504,841,332</u>	<u>17.52</u>

The reduction in Lancashire prices is clearly shown by the fact that the values of the British shipments remained approximately the same despite an increase of nearly 32,000,000 yards in the quantity. Japanese competition in woven coloured goods and dyed goods is increasing rapidly. She also ships large quantities of printed flannelettes. Italian competition is most serious in printed flannelettes and twills, in dyed flannelettes and in coloured woven coatings and trouserings. The quality, dye and finish of the Italian goods is improving rapidly, and Italian products now compete successfully with Lancashire in a constantly widening range of cloths.

(4) *Fents of all Descriptions.*—There has been a satisfactory advance in the imports of fents of all descriptions :—

Countries of consignment	1926-27		1927-28	
	yds.	Rs. (lakhs)	yds.	Rs. (lakhs)
United Kingdom ..	9,507,913	35	12,985,149	41
United States .. ..	11,442,782	29	23,246,640	52
Other countries .. ..	188,933	1	306,559	1
Total .. ..	21,139,628	65	36,538,348	94

American competition is becoming very keen. As I stated in my last report, this is largely due to the American attitude towards fents, which have hitherto been regarded in the United States as a waste product to be sold for what they will fetch. American shippers have therefore been able to place their fents on the Indian market at prices much below British quotations. It is to be hoped that the large firms of bleachers, dyers and printers in the United States will recognize this in future when disposing of their large stocks of fents to exporters.

*Shares of the Principal Competitors* in the total quantities of piece goods imported :—

Countries of consignment	1913-14	1924-25	1925-26	1926-27
	Per cent.	Per cent.	Per cent.	Per cent.
United Kingdom . . . .	97.1	82.3	82.0	78.2
Japan .. .. .	0.3	13.9	13.6	16.3
Holland .. .. .	0.8	1.1	1.1	1.0
Italy .. .. .	0.7	0.6	0.8	1.2
Switzerland .. .. .	0.2	0.4	0.6	0.7
Other countries .. . .	0.9	1.7	1.9	2.6
Total .. .. .	100.0	100.0	100.0	100.0

*Indian Mill Competition.*—The subjoined detailed statement gives the quantity (in pounds and their equivalent in yards) and description of the woven goods produced in Indian mills during the past three years. It will be noted that, in spite of the continued depression in Bombay and Ahmedabad, the total yardage produced in all-India rose from 2,259 million in 1926-27 to 2,356 million in 1927-28. The increase of nearly 100,000 yards was principally made up of increased production of the following types of cloth :—

Grey Shirtings and Longcloth, an increase of 40,000,000 yards.

Grey Dhuties, an increase of 30,000,000 yards.

Grey Khaddar Cloth, an increase of 17,000,000 yards.

Grey Drills and Jeans, an increase of 12,000,000 yards.

The total weight of cloth of all kinds rose from 539,000,000 to 568,000,000 pounds.

## INDIAN COTTON CLOTH PRODUCTION.

		Twelve months, April to March		
		1925-26	1926-27	1927-28
Grey and bleached piece goods				
Chadars ..	{ lbs	22,787,297	24,137,331	25,819,802
	{ yds	62,075,591	65,555,014	66,824,306
Dhuties ..	{ lbs	110,134,379	123,121,505	129,701,309
	{ yds	516,394,318	585,705,264	615,937,386
Drills and jeans	{ lbs	18,106,061	20,177,031	22,912,951
	{ yds	74,150,144	79,703,504	91,197,644
Cambrics and lawns	{ lbs	580,764	604,147	986,274
	{ yds	3,168,432	3,385,935	5,479,124
Printers ..	{ lbs	6,003,983	4,856,262	4,608,509
	{ yds	25,871,997	20,899,248	20,245,960
Shirtings and longcloths	{ lbs	120,019,866	134,771,604	140,831,481
	{ yds	521,125,944	580,536,490	620,027,624
T-cloths, domestics and sheet-ings ..	{ lbs	17,370,593	23,680,244	24,630,019
	{ yds	74,073,333	93,314,603	92,163,833
Tent-cloth ..	{ lbs	3,990,717	3,160,727	2,618,279
	{ yds	9,004,906	6,732,119	6,064,123
Khadi, Dungri or khaddar	{ lbs	30,444,405	35,809,549	41,485,317
	{ yds	87,406,216	98,670,894	116,118,753
Other sorts	{ lbs	9,826,309	11,320,965	9,873,922
	{ yds	41,034,924	42,734,703	40,943,836
Total				
	{ lbs	339,265,174	381,711,365	403,467,863
	{ yds	1,414,305,805	1,577,237,774	1,675,002,583
Coloured piece goods ..				
	{ lbs	116,695,300	145,320,476	148,297,621
	{ yds	540,156,845	681,478,291	681,557,222
Grey and coloured goods other than piece goods ..	{ lbs	3,726,511	4,151,302	4,205,147
	{ doz	955,804	1,006,548	992,107
Hosiery ..	{ lbs	872,861	983,308	1,210,366
	{ doz	316,546	351,919	437,215
Miscellaneous ..	{ lbs	3,772,129	4,289,142	5,828,863
Cotton goods mixed with silk or wool ..	{ lbs	707,712	2,313,760	4,794,002
Grand total				
	{ lbs	465,039,687	538,769,353	567,803,862
	{ yds	1,954,462,650	2,258,716,065	2,356,559,805
	{ doz	1,272,350	1,338,467	1,429,322

The Bombay mill strike started in April, 1928, and is therefore not reflected in these figures. At the end of the fiscal year Bombay had a stock of 152,000 bales of cloth. On June 30th, 1928, the stocks had fallen to 109,000 bales.

*General Forecast (June, 1928).*—The general factors are all favourable. The first official monsoon forecast was issued on June 6, and predicts that the monsoon rainfall is likely to be normal or in excess in the Peninsula and North-West India. This is as favourable a forecast as is ever issued by the Meteorological Department, and it may be anticipated that the rainfall this year will be adequate and that, for the sixth year in succession, India will be blessed with abundant harvests and consequent prosperity to the cultivators. The political horizon is as clear as it has been for many years. Dealers have regained confidence since the difficult years succeeding the slump. They have now, generally speaking, more capital to invest in piece goods owing to the profits of the past two years, and are undoubtedly less inclined to speculate and buy in excess of their likely requirements than was the case some years ago. The stabilization of the rupee also eliminates the speculative element from exchange. One can therefore regard the future with a certain element of restrained optimism.

## ARTIFICIAL SILK.

*Form.*—The imports of artificial silk yarns are increasing at a very rapid rate:—

Principal countries of consignment	1926-27		1927-28	
	lbs.	Rs. (lakhs)	lbs.	Rs. (lakhs)
United Kingdom	654,617	14	2,277,315	47
Germany ..	232,079	4	130,739	3
Netherlands	358,287	7	505,900	11
Switzerland	428,051	8	283,288	6
Italy ..	3,843,179	64	3,431,879	66
Other countries	259,884	5	880,448	16
Total	5,776,097	1,02	7,509,569	1,49

The extraordinarily rapid advance in the imports of Indian yarns appears to have been checked and, as I forecasted in my last report, the year under review gives a more correct indication of the position, as the large stocks of Continental yarn have been disposed of and the Indian mills are now consuming greatly increased quantities of artificial silk yarns of the higher grades, in which the United Kingdom specializes, for use as warps in mixture cloths. Moreover, the activities of the local branch in India of the leading British producer are making themselves felt.

Hitherto most of the yarns imported have been used by the handloom weavers in Northern India and Madras, who are usually indifferent to quality and whose main desideratum is low price. This accounts for the large consumption of cheap Italian and other Continental yarns. Indian mill owners, however, are now taking a keen interest in the production of cotton and artificial silk mixtures, and as they are much more particular with regard to quality, it is expected that the share of the British product will continue to increase. The rapid extension in the number of British factories producing artificial silk yarns will also be a further favourable factor.

The very great increase in the imports of artificial silk yarns has also been stimulated by the passing in September, 1927, of the Indian Tariff (Amendment) Bill, which reduced, *inter alia*, the import duty on artificial silk yarns from 15 per cent. to 7½ per cent. *ad valorem*. In speaking to this Bill, Sir George Rainy explained the objects of the Government of India in the following terms:—

“So far as India is concerned, we are chiefly concerned with mixed goods made partly from artificial silk and partly from cotton. The imports of these piece goods have increased very rapidly, and between the years 1924-25 and 1926-27 they more than doubled. At present both the mixed piece goods, made partly of artificial silk and partly of cotton and the artificial silk yarn that is imported into this country, are dutiable at 15 per cent. Both the cotton mills in Bombay and elsewhere, and also some of the handloom weavers, particularly in Southern India, have begun to manufacture these piece goods made of a combination of cotton and artificial silk, and the manufacturer has to pay on the artificial silk yarn that he uses the same rate of duty as is imposed on the imported fabrics which compete with what he makes. All that is proposed in the Bill is to reduce the duty on the artificial silk yarn from 15 to 7½ per cent. so that the manufacturer in this country, whether he be a handloom weaver or whether it be a cotton mill, will have a definite advantage in competing with imported piece goods.”

## PIECE GOODS OF COTTON AND ARTIFICIAL SILK.

Principal countries of consignment	1926-27		1927-28	
	yds.	Rs. (lakhs)	yds.	Rs. (lakhs)
United Kingdom ..	16,078,929	1,17	14,262,832	99
Germany ..	2,487,541	27	4,694,815	53
Belgium ..	979,974	8	757,177	7
Switzerland ..	6,697,960	59	11,054,793	89
Italy ..	13,900,507	81	16,021,907	91
Other countries ..	1,833,363	17	6,349,267	47
Total ..	41,978,274	3,09	54,140,791	3,86

The reduction of the British proportion of the values imported to 25 per cent. is disappointing. As I stated last year, there would appear to be two distinct classes of consumers of artificial silk piece goods in India. The great majority have limited means, and do not trouble much about quality. They are attracted by lustre and bright colours and by the relatively low price of the Continental products. The remainder, who, unfortunately, are much less numerous, take quality into consideration and are willing and able to pay the higher rates charged. The greater proportion of the goods imported are sold on price, and price alone, which accounts for the increasing imports from Italy and Switzerland, which are, generally speaking, sold at a much lower price than the British products.

There appears to be no reason why British manufacturers should not be able to obtain a much larger share of the business if only they can bring down their prices. The British product is acknowledged to be superior, but this fact is not fully realized by the average Indian buyer. The trade is so new that he neither knows nor cares in which country the material is manufactured, but if it is cheap and made up in attractive designs and colours he will buy. Some of the small shopkeepers assert that they frequently have Continental artificial silk cloths brought back to them after a few days' wear, with the complaint that the colours are not fast in water. This, of course, militates against the development of the trade. A systematic and energetic propaganda in favour of British artificial silk goods of quality would do much to allay this prejudice.

The trade is likely to be a rapidly expanding one, and will help to redress the balance caused by reduced imports of the coarser cotton goods. It is to be hoped that British manufacturers and shippers will realize the significance of this, and that they will leave no stone unturned in their efforts to secure a much larger share of the trade.

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## POLAND.

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According to information recently received from Lodz, the leading members of the Polish cotton textile industry are about to form a cotton spinners' association on sound business lines. This new formation of a spinners' organization is the outcome of recommendations of the American financial economic adviser to the Polish Government, Mr. Charles S. Dewey.

Fully 85 per cent. of the spindles in Poland have agreed to join this new syndicate, and it is expected to start operating within the next month and as soon as the new law prohibiting the working of the third shift becomes operative.

(1) Regulate the production of the American, Indian and Egyptian cotton yarn spinners, producing counts up to and including 44's, in accordance with the actual demand.

(2) Restrict the working of affiliated mills to 92 hours per week in two shifts. Exceptions to these hours will be made to firms producing for export.

(3) Fix minimum prices for the different counts and qualities of yarn.

(4) Control the sale of yarn produced by all the affiliated mills.

Spinners will make weekly returns to the central office showing the quantity of yarns sold, consumed and in stock. Should a member fail to make these returns he is liable to a fine of 100 to 5,000 Zloty. Selling below the fixed minimum prices will be punished by a fine of 10 per cent. of the value of the order.

Some further recommendations made by Mr. Dewey are to the effect that the output of factories joining the organization should be better standardized and more adapted to the needs of the Polish

market; that each factory should have an output quota, to be determined periodically by a special committee; production to be curtailed, if necessary, if the stocks of finished goods become excessive.

The association has started its operations on January 1, 1929; membership is for the minimum period of two years. Mr. Heinrich Grohmann, of Scheibler & Grohmann (which firm owns about 12 per cent. of all the spindles in Poland), Mr. A. Osser, Dr. A. Biedermann, Feliks Krusche, Moritz Poznanski, Direktor Otto Bankwitz, Oskar Kohn and R. Geyer are amongst the members of the provisional organization committee.

An announcement issued in Warsaw stated that the abolition of night work in all branches of the textile industry would come into force on January 1, 1929. It was further stated that no concessions to this new law will be granted, and all breaches of the same will be severely punished.

## RUSSIA.

Eleven new textile plants are under construction in Russia, according to the November Bulletin of the American-Russian Chamber of Commerce. The total cost of these mills will be about £8,600,000, the largest of which will contain 270,000 spindles, and will employ when complete 11,500 operatives.



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# MISCELLANEOUS

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## Statutes of the International Cotton Federation.

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*As amended at the Vienna International Cotton Congress, 1925.*

1. The purpose of this International Federation shall be to watch over and protect the common interests of the industry and to advise associations of the action to be taken against any common danger.

2. The means to be employed are:

(i) The holding of congresses of delegates from the associations in all countries becoming affiliated with the International Federation.

(ii) The appointment of a committee of management, who shall:

(a) Control the work and expend the moneys of the Federation under the instruction of the congress.

(b) Distribute information of practical value in carrying on and improving the conditions of the cotton trade.

(c) Assist in the formation, strengthening and assimilating of associations in all spinning and manufacturing centres of the cotton industry.

(d) Call together the delegates to special congress when the need shall arise.

(e) Consult the associations by correspondence and distribute and collect voting papers from the associations on any international movement in connection with the trade.

(f) Take any other action in common interest of the trade that may be decided upon by congress.

3. All associations of cotton spinners and manufacturers are eligible for affiliation with the International Federation, subject to their acceptance by committee and congress.

4. A levy shall be paid by each association according to its number of spindles and looms.

5. Spindles shall include mule, ring, throstle and doubling. Two doubling spindles to be equal to one mule spindle.

6. Each association joining the Federation shall pay an entrance fee of  $\frac{3}{100}$ ths of a penny per spindle and  $\frac{1}{4}$ d. per loom. This entrance fee shall include the current year's levy.

The levy for the years 1926 and 1927, and so long as it remains unaltered by congress, shall be:

$\frac{1}{1000}$ th of a penny per spindle,

$\frac{1}{5}$ th of a penny per loom.

7. Associations are liable for the coming year's levy unless they have handed in their resignation at least three months before the end of the current year. Resignation forfeits all rights to any accumulated funds.

8. All levies shall be due for payment before the end of September.

9. In case any association shall fail to pay its levy, or send delegates to the congress, the name of such association shall be placed before the congress to take what steps it may think fit.

10. The offices of the Federation shall be in Manchester. Any change in the headquarters must be by decision of the annual congress.

11. The committee of management shall consist of one delegate from each country possessing one or more duly constituted associations. Any country, however, having in membership more than 10,000,000 spindles, or equivalent in spindles and looms (12½ spindles equal 1 loom), shall be entitled to appoint one delegate on the committee for every 10,000,000 spindles or part thereof, but in no case shall any country be entitled to more than four delegates with voting power.

12. For the committee of management five shall form a quorum.

13. Each country shall have the right to appoint a substitute to attend the meetings of the committee in the event of its representative being unable to attend. This substitute, in order to become conversant with the work of the committee, may accompany the duly appointed representative to any meetings of the committee if the associations in his country so desire. Such substitute has no power to vote, nor is it expected that he will take part in the discussions at the meetings.

14. The committee shall appoint its secretary or secretaries and other assistants, bankers, auditors and solicitors, and such appointments shall be confirmed annually or otherwise.

15. The committee shall have power to appoint, from its own body, any of its members for the purpose of obtaining information or undertaking preparatory work in connection with any of the objects of the Federation. Such information or preparatory work to be reported upon periodically to the committee through its secretary.

16. Should a position as officer or member of the committee become vacant by death or resignation the committee shall have power to fill such position—if an officer, from its own body; if a member of the committee, from the delegates of the country represented.

17. The committee shall meet when it is desirable, but where possible the consultation shall be done by correspondence. When

possible at least four weeks notice shall be given of any meeting of the committee of management.

18. On the request of one-fourth of the members of the committee (which always includes the officers), the chairman shall call a meeting.

19. The members of the committee of management, when attending meetings of the committee, are not entitled to payment of travelling or out-of-pocket expenses from the funds of the International Federation. Such expenses are to be borne by the associations they represent or by the members of the committee themselves. In cases where the committee appoints a member to undertake special work which necessitates a journey his out-of-pocket expenses will be defrayed from the funds of the International Federation.

20. The bank account shall be in the names of the chairman of the committee and the secretary at headquarters, and all cheques shall be signed by the chairman or one of the honorary treasurers and countersigned by one of the secretaries.

21. The bank account shall not be overdrawn and no expenditure or liability shall be incurred for which there are no funds in the bank.

22. The financial year shall end December 31.

23. In case of dissolution the funds in hand shall be divided on the basis of the contributions made by the affiliated associations.

24. The congress shall be in a different country each time.

25. When possible at least four weeks' notice shall be given of any meeting of congress.

26. The associations in each country shall appoint delegates to attend the congresses. No restriction shall be placed on the number of delegates any association may send, but the voting power shall be as follows:

One vote for each million spindles or part thereof;

One vote for each 40,000 looms or part thereof, but not more than twenty votes to be given by any one country.

Voting shall be by the showing of hands, but shall be by ballot if desired by 25 per cent. of those present empowered to vote.

27. Each association shall, before the end of March, appoint its delegates for the following congress, and shall at once intimate to the secretary the names, postal addresses and cable addresses of such delegates.

28. Fourteen days' notice shall, if possible, be given to the secretary at headquarters of any change in the appointment of delegates.

29. The expenses of delegates shall be paid by the association they represent, or by the delegates themselves.

30. If a delegate be unable to be present he may be replaced by another representative of his association. This representative, however, must present satisfactory credentials to the committee.

31. Any association wishing to bring a subject before the annual congress, or propose the alteration of a rule, shall forward its resolution to the secretary at headquarters before the end of March.

32. The member of the committee of management representing the country in which the congress assembles shall preside over such congress. The names of the delegates shall be called over, after which the chairman of the committee of management shall present a report, to be followed by the reading of the financial statement.

33. The remaining proceedings shall be arranged by the committee of management, but shall be subject to alteration should the congress desire.

34. Permission may be granted for the discussion of matters which do not comply with Rule 31, but no vote can be taken.

35. In order to expedite the discussions of the congress the introducer of any subject shall be allowed one hour. Subsequent speakers shall be allowed fifteen minutes, which the chairman may, at his discretion, extend to thirty minutes.

36. Delegates may speak in English, French or German, but it is desirable that they use the English language, in order to obviate, as far as possible, the necessity of translation.

37. No resolution in any congress shall be voted upon except 75 per cent. of the delegates empowered to vote are present, and no resolution shall be carried except by a majority of 75 per cent. of those voting.

38. No resolution shall be voted upon at the sitting at which it has been introduced (unless a 75 per cent. majority be in favour of such vote being taken), except for the appointment of officers of the congress and the fixing of the next place of the congress.

39. The place of meeting for the next congress shall be decided upon at the last meeting of a congress

40. Official reporters shall be appointed to take a verbatim report of all proceedings and submit a general report of the day's proceedings for the committee's approval before giving it to the press.

41. No strangers shall be allowed to attend the sittings of congress except they have a special written permit from the committee.

42. Voting by correspondence with the associations shall be by spindles (one loom equalling 25 spindles and two doubling spindles to be equal to one mule spindle). The ratio of voting power shall be as per Rule 26.

43. These rules may be added to, varied or rescinded at any annual congress, but notice of any proposed alteration shall be sent by the secretary with the notice convening the annual congress.

44. Local committees may be formed in each country for the purpose of discussing questions of international interest. The meeting forming such local committee shall be convened by the various representatives on the committee of management.

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## ARTIFICIAL COTTON.

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The British press recently published several articles on this subject, but hitherto we have not been able to obtain samples or further particulars to bear out the exceptional claims made by the producers of the fibre.

It is claimed that the fibre can be produced on even poor soils in almost any part of the world. It has already been grown in Florida, on the Gulf of Mexico, Canada, Australia, New Zealand, South Russia, Peru, South Africa, and even in England, Scotland and Norway.

The fibre is of the bast family, and is more akin to flax than cotton. Some accounts state that it is of very short staple, averaging  $\frac{3}{8}$  in., whilst others mention a staple length of about  $1\frac{1}{2}$  ins. So far it has only been possible to spin 16's and 20's from this new fibre.

The raw material has to be chemically treated after reaping, presumably a treatment similar to the retting of flax or jute, by chemical processes. After this treatment the product is said to resemble cotton lint very closely, though it is said that it has a higher lustre and is of a very white colour.

There are actually in use over 500 plant fibres in the world to-day, and it must be remembered that in addition many others have been investigated from time to time, and most of them have been given up for industrial purposes. During the war Germany investigated many new fibres with a view to substituting them for cotton, but with the end of the war, when cotton was again available, their use died out.

The name of the firm producing this new fibre is The English Artificial Cotton Production and Marketing Corporation Ltd., Windsor House, Victoria Street, London, S.W.1.

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## Articles Received Too Late for Classification.

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### STATE OF TRADE.

#### SWITZERLAND.

Die ungünstige Entwicklung der Marktlage machte im zweiten Semester weitere Fortschritte; sie begann sich erst in diesem Zeitabschnitt, mit der sukzessiven Aufarbeitung der noch vorhanden gewesen Orders, voll auf die Produktion auszuwirken.

Im Laufe des Spatsommers erreichten die Betriebsbeschränkungen in einzelnen Etablissements der Grob- und Mittelfeinspinnerei bis zu 30 und mehr Prozent der Normalproduktion, gingen dann gegen Jahresende auf 25 Prozent im Maximum zurück. Immerhin blieben noch rund 10 Prozent der Belegschaft von Kurzarbeit betroffen. Gleichzeitig flaute auch die Nachfrage nach Feingespinnsten ab, begleitet von einem scharfen Preisdruck seitens ausländischer Spinner. Die Betriebe klagen über schleppende

Kontraktabnahme und ihrer etliche sehen sich mangels Disposition der Kunden, trotz befriedigenden Auftragsbestandes, zur Drosselung der Produktion gezwungen. Ueberangebot und Preis-schleuderei lassen in der Zwirnerei eine Erholung nicht aufkommen. Die Grobweberei konnte im Spätherbst, Dank einiger Nachfrage nach gewissen Gewebesortimenten, wenigstens ihre Lager etwas lichten. Die Mittelfeinweberei kam über ein unzulängliches, schleppendes Geschäft nicht hinaus, während sich die Situation der Feinweberei immer mehr zuspitzte, zu Produktionseinschränkungen führte und weitere in nahe Aussicht stellt. Einzig die völlig auf den Inlandmarkt zurückgedrängte Buntweberei erfreute sich voller Beschäftigung bei allerdings gedrückten Preisen.

In der gesamten Industrie wird über kurze Lieferfristen und Preisdruck geklagt. Wenn sie bis jetzt keine Arbeitslosen und relativ wenig Kurzarbeiter aufweist, so ist es lediglich der Verteilung der Belegschaften auf eine kleinere Maschinenzahl zuzuschreiben, im Bestreben, die Arbeiterschaft den Betrieben nach Möglichkeit zu erhalten. Die Produktionseinschränkungen sind daher erheblich grosser, als der aussere Aspekt der Industrie vermuten lässt. Leider lagen am Jahresende keinerlei Anzeichen für eine baldige Besserung vor.

	IMPORT		EXPORT	
	q. kg.	Fr.	q. kg.	Fr.
Baumwollgarne	19,010-58	16,568,326	33,541-02	19,059,321
Baumwollgewebe	10,978-79	14,413,310	26,780-80	33,814,677
Stickereien	51-19	196,252	12,130-03	41,591,644
	<u>30,040-56</u>	<u>31,177,888</u>	<u>72,451-85</u>	<u>94,465,642</u>

**American Cotton Acreage, 1929.** Dr. A. B. Cox, of Austin, Texas, in *Commerce and Finance* of the 9th January, states that if the price and other factors determining acreage in the United States Cotton Belt meet with normal response, the cotton acreage planted in 1929 would be about 47,070,000 acres.

**Cotton Grade and Staple Report, U.S.A.** Of the 12,540,275 bales of Upland Cotton ginned to December 1, 1928, 10,709,921 bales, or 85.26 per cent., were tenderable, according to estimates made by the U.S.A. Bureau of Agricultural Economics.

#### COTTON TENDERABLE AND UNTENDERABLE

	Bales	Per Cent
Total Upland cotton	12,540,275	99.83
Total tenderable	10,709,921	85.26
Tenderable, $\frac{7}{8}$ " to $1\frac{1}{2}$ " incl	9,479,644	75.45
Tenderable, over $1\frac{1}{2}$ "	1,230,277	9.79
Total untenderable	1,830,354	14.57

#### STAPLE LENGTHS OF UPLAND COTTON

Staple in Inches	Bales	Per Cent
Total	12,540,275	99.83
$\frac{7}{8}$ " and under	1,674,425	13.33
$\frac{7}{8}$ "	5,225,469	41.60
$\frac{7}{8}$ "	2,929,352	23.32
1" and $\frac{1}{32}$ "	1,472,537	11.72
$1\frac{1}{16}$ " and $1\frac{3}{32}$ "	642,084	5.11
$1\frac{1}{8}$ " and $1\frac{1}{2}$ "	413,117	3.29
$1\frac{1}{8}$ " and $1\frac{1}{2}$ "	155,599	1.24
$1\frac{1}{8}$ " and over	27,692	0.22

(Continued on page 377)

# COTTON TRADE STATISTICS

## ENGLAND.

COTTON YARN EXPORTS TWELVE MONTHS ENDED DECEMBER 31

	1926 lbs	1927 lbs	1928 lbs
Russia .. .. .	5,932,000	150,200	198,300
Sweden .. .. .	1,381,100	1,410,200	1,786,800
Norway .. .. .	3,960,400	3,334,700	3,205,900
Denmark .. .. .	1,161,400	1,214,400	1,486,500
Poland (including Dantzic)	432,700	5,224,000	2,253,200
Germany .. .. .	33,858,300	56,602,900	43,631,200
Netherlands .. .. .	37,564,300	41,756,500	33,452,500
Belgium .. .. .	6,662,900	8,592,800	5,767,800
France .. .. .	7,996,300	3,824,700	4,175,300
Switzerland .. .. .	7,825,300	10,411,800	9,089,600
Italy .. .. .	1,027,400	506,400	982,300
Austria .. .. .	730,700	1,355,600	1,334,700
Czecho-Slovakia .. .. .	1,196,700	2,746,200	3,102,900
Serb-Croat-Slovene State .. .. .	1,515,200	2,992,100	1,673,000
Bulgaria .. .. .	2,901,700	3,033,300	2,388,500
Roumania .. .. .	7,512,300	7,056,800	5,753,300
Turkey .. .. .	1,083,000	693,200	741,200
China (including Hong Kong) .. .. .	1,727,100	1,267,900	1,724,800
United States of America .. .. .	3,307,600	2,988,000	2,360,600
Brazil .. .. .	2,356,200	2,666,000	3,140,400
Argentine Republic .. .. .	1,841,600	2,236,700	2,115,700
British India .. .. .			
Bombay, via Karachi .. .. .	646,600	751,700	628,200
" Other ports .. .. .	8,163,000	7,929,900	8,462,000
Madras .. .. .	6,244,000	6,660,400	6,792,500
Bengal, Assam, Bihar & Orissa .. .. .	4,286,100	5,262,900	4,961,000
Burmah .. .. .	1,155,300	959,300	879,200
Straits Settlements & Malay States .. .. .	385,100	273,600	225,900
Australia .. .. .	4,726,800	5,508,700	4,360,300
Canada .. .. .	1,131,900	1,478,300	1,800,200
Other countries .. .. .	10,713,200	11,575,500	10,737,800
Total .. .. .	168,526,800	200,464,700	169,211,600
Grey, unbleached .. .. .	150,813,200	179,319,900	150,164,800
Bleached and dyed .. .. .	17,713,600	21,144,800	19,046,800
Total .. .. .	168,526,800	200,464,700	169,211,600

TWELVE MONTHS ENDED DECEMBER 31.

	lbs.	£
1913 .. .. .	210,099,000	15,006,291
1925 .. .. .	189,531,200	30,501,416
1926 .. .. .	168,526,800	21,781,178
1927 .. .. .	200,464,700	23,608,368
1928 .. .. .	169,211,600	22,566,493

## COTTON CLOTH EXPORTS TWELVE MONTHS ENDED DECEMBER 31.

	1926	1927	1928
	sq. yds.	sq. yds.	sq. yds.
Sweden . . . . .	23,053,000	25,895,000	21,801,000
Norway . . . . .	14,163,300	17,308,700	14,551,300
Denmark . . . . .	26,070,400	28,330,300	23,398,600
Germany . . . . .	51,935,600	77,317,500	52,610,600
Netherlands . . . . .	44,846,700	66,064,500	66,189,000
Belgium . . . . .	28,824,900	30,296,900	24,417,500
France . . . . .	21,410,500	14,562,500	12,226,900
Switzerland . . . . .	103,889,100	146,346,400	119,772,200
Portugal, Azores and Madeira	14,810,600	12,969,200	10,200,000
Italy . . . . .	19,490,300	8,721,100	12,117,400
Greece . . . . .	27,038,700	39,937,100	29,950,700
Roumania . . . . .	16,811,200	16,815,700	14,883,000
Turkey . . . . .	56,215,200	61,542,600	55,230,500
Syria . . . . .	23,744,600	30,424,000	17,208,000
Egypt . . . . .	123,873,700	159,883,900	128,670,300
Morocco . . . . .	47,736,100	52,289,700	62,400,300
Foreign West Africa . . . . .	68,363,800	53,420,500	64,412,000
Foreign East Africa . . . . .	7,307,500	11,152,500	15,407,300
Iraq . . . . .	55,007,100	80,139,400	48,536,300
Persia . . . . .	14,995,500	18,540,600	18,721,300
Dutch East Indies . . . . .	121,767,000	138,243,300	143,056,800
Philippine Islands & Guam . . . . .	10,751,000	12,819,900	12,502,400
Siam . . . . .	22,192,900	25,369,500	23,373,900
China (including Hong Kong)	177,685,300	103,194,800	186,521,000
Japan . . . . .	10,823,100	13,541,900	11,906,200
United States of America . . . . .	51,340,200	47,075,900	38,945,100
Cuba . . . . .	10,345,600	11,723,500	10,981,200
Mexico . . . . .	19,243,000	11,202,100	16,400,500
Central America . . . . .	15,936,000	13,089,000	14,043,300
Colombia . . . . .	45,775,600	38,433,000	41,142,200
Venezuela . . . . .	24,186,400	18,997,400	22,386,300
Ecuador . . . . .	6,456,700	5,592,300	5,927,500
Peru . . . . .	13,129,300	12,136,000	11,074,300
Chile . . . . .	36,179,600	39,260,100	27,625,000
Brazil . . . . .	62,206,400	61,016,700	55,191,500
Uruguay . . . . .	16,053,600	16,018,700	19,746,200
Bolivia . . . . .	4,870,900	3,219,300	2,856,500
Argentine Republic . . . . .	112,576,100	131,177,400	148,922,300
British West Africa . . . . .	106,690,200	144,444,900	146,015,500
British South Africa . . . . .	72,123,900	73,180,900	69,196,700
British East Africa . . . . .	15,442,100	18,442,400	18,456,700
British India . . . . .			
Bombay, via Karachi . . . . .	272,459,500	290,833,500	328,968,900
Other ports . . . . .	231,584,600	285,212,400	358,684,400
Madras . . . . .	93,138,100	84,499,100	92,249,700
Bengal, Assam, Bihar & Orissa	902,411,700	924,941,700	710,112,300
Burmah . . . . .	65,669,000	67,027,000	51,768,100
Straits Settlements & Malay States	69,204,000	77,560,400	62,561,000
Ceylon . . . . .	32,953,800	35,754,100	26,064,200
Australia . . . . .	181,122,500	187,513,000	143,009,500
New Zealand . . . . .	32,187,900	35,112,100	30,567,200
Canada . . . . .	45,716,400	46,318,100	43,740,800
British West India Islands & British Guiana . . . . .	21,763,500	23,676,300	22,151,000
Other countries . . . . .	140,908,500	168,298,200	157,740,500
Total . . . . .	3,834,482,200	4,116,883,000	3,866,592,900
Grey, unbleached . . . . .	1,204,382,000	1,302,997,200	1,084,141,800
Bleached . . . . .	1,297,117,100	1,345,290,600	1,348,709,900
Printed . . . . .	510,378,400	573,312,600	545,519,200
Dyed in the piece . . . . .	674,342,500	742,355,300	745,022,400
Manufactured of dyed yarn . . . . .	148,262,200	152,927,300	143,199,600
Total . . . . .	3,834,482,200	4,116,883,000	3,866,592,900

TWELVE MONTHS ENDED DECEMBER 31.

		sq. yds.	£
1913	.. .. .	7,075,252,000	97,775,555
1925	.. .. .	4,435,617,800	159,627,835
1926	.. .. .	3,834,482,200	116,052,953
1927	.. .. .	4,116,883,000	109,995,715
1928	.. .. .	3,866,592,900	107,300,045

## EXPORTS OF PIECE GOODS OF COTTON AND ARTIFICIAL SILK MIXED.

Country	Total Exports for 11 months ending		Compared — or — with the Exports for 11 months ending		Exports during November, 1928		Compared — or — Exports during November, 1927	
	November, 1928		November, 1927		November, 1928		November, 1927	
	sq. yds.	£	sq. yds.	£	sq. yds.	£	sq. yds.	£
British India	19,619,825	829,738	—	4,179,700	990,652	37,925	—	624,954
Brazil	13,280,966	826,188	—	8,152,312	1,680,266	96,580	—	782,587
Canada	8,812,010	782,277	—	2,714,065	1,051,278	87,978	—	480,395
Dutch East Indies	6,197,890	309,490	—	1,465,500	580,108	30,036	—	227,328
Australia	5,722,697	563,477	—	1,817,522	608,224	54,189	—	199,903
British South Africa	4,995,765	406,548	—	2,577,859	668,029	47,880	—	273,433
Egypt	3,644,557	233,589	—	930,321	319,238	20,114	—	49,029
British West Africa	2,469,493	151,241	—	284,344	363,933	21,485	—	64,481
New Zealand	2,258,685	214,255	—	1,289,581	180,522	16,598	—	78,689
Central America	2,143,946	113,965	—	461,693	214,591	11,109	—	23,104
China (including Hong Kong)	1,749,326	140,081	—	157,644	424,969	32,276	—	400,082
Colombia	1,635,814	99,658	—	175,946	131,540	8,307	—	14,674
Ceylon	1,475,654	74,725	—	274,872	27,942	1,518	—	139,673
Other countries	18,554,731	1,304,120	—	—	1,403,123	98,290	—	—
Total—all markets	92,561,359	6,049,352	—	28,651,749	8,644,415	564,235	—	807,114
			—	£1,957,823			—	£86,748

The variation in the different qualities of cloths exported is given as follows:—

Containing—	Percentage of the Total 11 months' Trade.
Under 5% of artificial silk .. .. .	3
5% and under 10% of artificial silk .. .. .	10
10% .. .. .	9
15% .. .. .	8
20% .. .. .	10
30% .. .. .	11
40% .. .. .	27
50% .. .. .	14
60% and over .. .. .	7

## INDIA.

## DETAILED STATEMENT OF THE QUANTITY (IN POUNDS) AND THE COUNTS (OR NUMBERS) OF YARN SPUN.

Count or Number					Six months, April to September		
					1926	1927	1928
1	..	.	..	..	2,450,329	5,359,770	669,292
2	..	..	..	..	5,209,516	3,780,232	1,911,772
3	..	..	..	..	1,494,865	1,180,740	410,829
4	..	..	..	..	4,792,016	4,719,137	1,965,431
5	..	..	..	..	1,100,657	1,417,853	1,111,927
6	..	..	..	..	4,294,251	4,905,160	2,573,933
7	..	..	..	..	10,924,404	10,672,851	4,464,947
8	..	..	..	..	4,414,212	5,967,168	1,798,338
9	..	..	..	..	7,580,230	8,597,663	4,118,045
10	..	..	..	..	13,965,232	10,409,205	5,554,799
Total, Nos. 1 to 10					56,225,712	57,009,779	24,579,313
11	..	..	..	..	22,893,945	18,387,774	11,409,486
12	..	..	..	..	14,204,760	14,611,067	8,232,903
13	..	..	..	..	12,449,924	13,521,515	9,423,273
14	..	..	..	..	14,079,516	16,601,308	8,598,023
15	..	..	..	..	9,979,075	11,628,188	7,101,572
16	..	..	..	..	15,540,666	17,269,828	10,898,888
17	..	..	..	..	9,002,843	10,503,062	5,165,514
18	..	..	..	..	11,261,955	12,112,707	8,662,637
19	..	..	..	..	7,787,664	7,713,944	5,992,215
20	..	..	..	..	76,307,767	78,384,116	46,887,970
Total, Nos. 11 to 20					193,508,115	200,733,509	122,372,481
21	..	..	..	..	29,590,751	31,044,190	16,946,802
22	..	..	..	..	22,771,736	27,104,381	16,741,203
23	..	..	..	..	4,827,075	5,086,713	3,628,248
24	..	..	..	..	26,607,279	29,753,030	15,714,563
25	..	..	..	..	1,678,252	2,019,959	1,510,548
26	..	..	..	..	7,990,174	7,249,770	5,813,455
27	..	..	..	..	3,354,411	3,420,094	1,065,959
28	..	..	..	..	7,365,271	6,735,457	6,554,462
29	..	..	..	..	1,252,926	1,154,781	952,847
30	..	..	..	..	21,671,430	21,595,892	18,300,979
Total, Nos. 21 to 30					127,109,335	135,164,267	87,229,066
31	..	..	..	..	1,005,668	816,398	1,031,343
32	..	..	..	..	5,640,642	6,381,895	5,976,103
33	..	..	..	..	763,113	944,022	384,328
34	..	..	..	..	897,906	881,200	882,491
35	..	..	..	..	256,111	115,313	83,598
36	..	..	..	..	913,633	1,459,026	561,445
37	..	..	..	..	568	23,440	66,666
38	..	..	..	..	154,589	156,022	96,619
39	..	..	..	..	6,095	—	25,927
40	..	..	..	..	4,332,967	5,748,626	5,314,408
Total, Nos. 31 to 40					13,971,292	16,528,942	86,322,928
Above 40					5,418,770	6,040,886	384,144,582
Wastes, etc.					772,464	3,219,282	348,706
GRAND TOTAL..					397,005,712	418,696,665	545,516,290
							745,051
							143,134,660

DETAILED STATEMENT OF THE QUANTITY IN POUNDS AND  
THEIR EQUIVALENT IN YARDS, AND DESCRIPTION OF **WOVEN**  
**GOODS** MANUFACTURED.

Description	Six months, April to September		
	1926	1927	1928
Grey and bleached piece goods			
Chadars .. .. .	lbs. 13,168,582 ..	14,104,229 ..	8,261,895
	yds. 36,717,949 ..	35,955,860 ..	23,354,329
Dhutis .. .. .	lbs. 63,272,716 ..	67,399,782 ..	53,511,314
	yds. 305,203,745 ..	322,629,411 ..	256,906,490
Drills and jeans..	lbs. 8,337,767 ..	10,747,249 ..	6,020,659
	yds. 33,299,473 ..	42,387,583 ..	24,794,230
Cambrics and lawns	lbs. 353,777 ..	478,070 ..	388,309
	yds. 1,823,056 ..	2,759,997 ..	2,112,797
Printers .. .. .	lbs. 2,330,005 ..	2,147,481 ..	2,200,779
	yds. 10,322,937 ..	9,420,759 ..	10,633,937
Shirtings and longcloth	lbs. 74,128,412 ..	72,739,313 ..	38,046,944
	yds. 322,908,634 ..	317,349,032 ..	170,488,652
T-cloth, domestics, and sheetings .. ..	lbs. 10,214,349 ..	12,673,679 ..	7,479,999
	yds. 43,040,204 ..	47,628,783 ..	30,269,933
Tent-cloth .. ..	lbs. 1,115,939 ..	1,191,914 ..	1,236,421
	yds. 2,502,552 ..	2,775,835 ..	2,934,061
Khadi, Dungi or Khaddar .. ..	lbs. 14,483,082 ..	21,531,818 ..	11,478,585
	yds. 39,961,935 ..	60,092,281 ..	34,585,003
Other sorts .. ..	lbs. 6,212,022 ..	5,458,615 ..	3,227,459
	yds. 23,046,755 ..	22,591,668 ..	13,628,040
Total .. .. .	lbs. 193,616,651 ..	208,472,141 ..	131,852,364
	yds. 818,827,240 ..	863,582,209 ..	569,707,472
Coloured piece goods ..	lbs. 67,349,147 ..	75,161,792 ..	35,607,365
	yds. 318,377,397 ..	339,281,234 ..	168,338,897
Grey and coloured goods, other than piece goods	lbs. 2,279,318 ..	2,037,194 ..	1,110,632
	doz. 523,290 ..	459,252 ..	242,560
Hosiery .. .. .	lbs. 494,694 ..	586,391 ..	694,022
	doz. 176,446 ..	211,602 ..	262,511
Miscellaneous .. ..	lbs. 2,120,122 ..	3,122,948 ..	1,918,252
Cotton goods mixed with silk or wool .. ..	lbs. 1,055,688 ..	2,469,524 ..	1,384,736
GRAND TOTAL..	lbs. 266,915,620 ..	291,848,090 ..	172,567,371
	yds. 1,137,204,637 ..	1,202,863,443 ..	738,046,369
	doz. 699,736 ..	670,854 ..	445,071

# JAPANESE COTTON YARN AND CLOTH STATISTICS.

Compiled by the International Cotton Federation from the 51st Half Yearly Report of the Japan Cotton Spinners' Association, Osaka.

## QUANTITY OF YARNS PRODUCED IN JAPANESE COTTON MILLS, BY COUNTS, DURING FIRST HALF OF 1928

(In bales of 300 kin; 1 kin = 1½ English lbs)

WEFT				DOUBLED YARN			
Counts	1st half of year 1928	2nd half of year 1927	1st half of year 1927	Counts	1st half of year 1928	2nd half of year 1927	1st half of year 1927
9's or less	9,679.0	21,492.5	18,617.0	under 10's	282.0	517.5	32.0
10's	21,734.5	42,982.5	49,152.5	10's	3,817.0	4,462.0	4,608.5
12's	5,268.0	18,449.5	18,884.0	14's	940.5	1,358.0	956.0
13's	2.5	10.0	21.5	15's	—	—	—
14's	7,406.5	16,684.0	22,758.0	16's	4,047.0	4,350.5	4,562.5
15's	25.5	14.0	556.0	18's	6.0	—	—
16's	27,445.5	61,237.5	79,686.5	20's	12,978.0	13,773.5	14,656.0
18's	50.0	0.5	191.0	21's	—	47.0	—
20's	1,847.0	2,819.5	3,410.5	22's	—	143.0	389.0
21's	—	214.0	—	23's	—	—	25.0
22's	292.0	160.0	347.0	24's	—	225.0	530.0
24's	—	—	44.5	25's	—	—	—
25's	197.0	—	—	26's	—	93.0	238.0
TWIST				27's	—	—	11.0
under 10's	16,851.0	13,801.0	17,072.5	28's	—	73.0	352.5
10's	60,506.0	44,514.0	45,467.0	30's	80.5	55.0	71.0
11's	1,914.0	1,518.5	1,883.0	32's	7,811.5	6,171.0	9,476.0
12's	15,193.0	2,845.0	4,319.5	40's	618.0	616.0	1,614.0
13's	13.0	383.0	2,877.5	42's	71,184.0	71,348.0	83,885.5
14's	56,244.0	64,969.0	66,853.5	45's	—	38.5	—
15's	19,997.0	20,813.5	29,944.5	51's	—	—	—
16's	82,106.5	48,233.0	50,755.5	52's	—	—	—
17's	466.0	292.0	409.0	60's	73.5	106.0	118.5
18's	3,277.0	3,125.5	2,081.5	80's	—	1.0	—
19's	—	—	—	GASSED			
20's	356,679.0	378,324.0	406,349.0	under 10's	—	—	—
21's	10,231.5	8,055.5	8,542.0	10's	—	—	—
22's	5,752.0	7,051.0	7,114.5	16's	128.0	120.0	203.0
23's	30,369.0	33,433.5	29,828.0	17's	—	—	—
24's	16,079.5	16,400.0	17,226.5	18's	—	—	—
25's	10,589.5	9,142.0	10,203.5	20's	1,164.5	1,585.5	2,490.0
26's	1,570.0	688.0	362.5	22's	—	—	10.0
27's	2,670.5	2,347.0	2,493.0	24's	15.5	—	11.0
28's	1,644.5	1,139.5	751.0	27's	—	11.0	—
29's	1,160.0	328.0	1.0	28's	—	—	5.0
30's	85,251.0	74,241.0	73,902.5	30's	165.5	217.5	207.0
31's	639.0	—	0.5	32's	—	—	—
32's	38,291.5	27,166.5	32,651.5	40's	196.0	279.0	113.5
33's	2,447.0	9.0	0.5	42's	—	5.0	5.0
34's	4,267.0	30,68.5	2,076.5	50's	146.0	229.0	68.0
35's	7,171.0	4,762.5	5,242.5	51's	—	60.5	20.0
36's	21,533.0	21,152.5	21,723.5	55's	9.5	104.5	18.5
37's	477.5	1,811.5	422.5	56's	5.5	49.0	37.0
38's	13,681.5	13,843.5	11,932.0	57's	—	—	—
39's	3,149.5	2,464.0	373.0	60's	14,911.0	12,390.0	15,917.0
40's	88,116.5	83,852.0	87,687.0	62's	—	—	186.0
41's	1,039.5	2,497.5	2,419.0	63's	—	—	—
42's	7,659.5	7,179.0	6,975.5	64's	3,231.0	5,658.0	2,878.5
43's	—	—	—	65's	—	7.5	—
44's	2,930.5	1,687.0	1,143.0	68's	1.0	—	—
45's	2,424.5	3,647.5	4,275.0	70's	2.5	1.5	—
46's	4,521.0	4,558.5	4,628.0	77's	46.5	11.0	—
50's	10.0	—	—	79's	—	—	—
51's	—	—	—	80's	10,617.5	9,510.5	12,423.0
55's	—	259.0	—	84's	1,420.0	1,766.0	781.0
56's	—	—	—	85's	—	—	—
60's	332.0	86.0	226.0	90's	—	—	—
80's	18.5	19.5	19.0	100's	1,468.5	1,217.0	2,096.5
100's	67.5	39.5	26.0	110's	—	—	—
120's	2.0	4.0	—	120's	143.0	97.0	146.0
				Not specified	284.0	349.5	762.0
				Total	1187083.5	1216862.5	1313830.0

It should be noted that the above figures are returns from 6,076,812 affiliated spindles out of a total of 6,230,512 spindles in Japan

## JAPAN.

## EXPORTS OF COTTON CLOTH DURING THE FIRST HALF OF 1928

	First half, 1928		Second half, 1927		First half, 1927	
	sq. yds.	yen	sq. yds.	yen	sq. yds.	yen
Grey goods . . . . .						
Imitation nankeens ..	14,381,075	3,371,472	—	—	—	—
Drills ..	13,162,175	2,990,064	—	—	—	—
Jeans ..	15,392,141	3,803,942	—	—	—	—
" Kokura " ..	982	444	—	—	—	—
Crepes ..	1,164	248	—	—	—	—
Cotton Flannels ..	61,465	21,983	—	—	—	—
Shirts ..	173,453,326	32,143,708	157,547,116	32,069,986	156,891,820	31,815,958
Sheetings ..	61,343,945	13,192,860	81,843,886	19,083,414	53,409,224	21,786,765
T cloths ..	5,886,439	1,282,261	—	—	—	—
Muslin de laine ..	812	39	—	—	—	—
Ducks ..	1,213,634	666,370	—	—	—	—
Others ..	390,822	60,197	—	—	—	—
Total ..	285,293,478	57,542,588	239,391,002	52,058,400	242,301,044	53,602,723
Bleached goods.						
Imitation nankeens ..	1,063,139	192,448	28,288,747	3,502,785	29,321,442	3,745,049
Drills ..	562,914	95,616	—	—	—	—
Jeans ..	3,341,692	940,414	—	—	—	—
" Kokura " ..	13,868	6,254	—	—	—	—
Crepes ..	7,049,491	1,490,087	—	—	—	—
Flannels ..	841,890	241,030	—	—	—	—
Shirts ..	63,924,426	14,308,629	31,207,568	7,155,176	40,052,944	9,115,419
Sheetings ..	218,869	32,064	920,350	218,531	313,885	88,711
T cloths ..	312,301	66,721	—	—	—	—
Others ..	1,381,074	337,027	—	—	—	—
Total ..	78,889,673	18,710,290	60,416,665	10,876,492	69,683,261	12,739,179
Printed and dyed goods *						
Striped tissues ..	39,098,154	8,825,276	2,035,784	9,012,352	2,496,131	10,370,460
Dyed imitation nankeens ..	1,578,098	387,930	2,258,824	526,048	1,372,271	353,936
Drills ..	29,686,642	6,713,309	63,844,930	19,390,031	67,651,515	21,920,742
Jeans ..	69,188,026	18,897,711	92,786,141	22,036,940	82,819,758	20,110,428
" Kokura " ..	7,665,706	1,950,954	10,500,065	3,835,469	3,889,854	1,790,748
Crepes ..	10,529,366	2,185,524	19,611,727	3,977,712	19,821,079	4,365,715
Flannels ..	7,496,183	2,024,237	57,157,573	16,968,405	7,743,712	2,370,320
Shirts ..	32,481,253	6,678,643	21,527,788	4,169,506	27,022,439	5,793,843
Prints ..	46,311,849	10,186,168	23,909,934	5,949,547	50,452,985	10,326,657
T cloths ..	16,343,770	3,727,859	28,654,425	6,212,771	31,238,458	6,992,457
Muslin de laine ..	5,042,950	1,143,883	—	—	—	—
Ducks ..	533,703	212,084	1,730,747	812,211	2,181,764	1,081,654
Satins ..	54,957,100	22,763,198	107,215,187	37,837,718	5,037,319	18,591,628
Poplins ..	4,121,589	1,852,564	4,065,499	2,242,402	3,627,817	1,932,521
Others ..	22,058,850	7,885,319	—	9,230,746	—	4,820,858
Total ..	347,093,074	95,435,659	—	141,751,858	—	110,732,102
Others .						
Cotton blankets .100 km	13,715	1,279,132	13,169	2,279,423	7,669	946,423
Handkerchiefs .. doz.	437,724	418,312	201,171	200,786	197,505	193,500
Towels ..	876,088	1,803,196	899,390	2,037,994	669,305	1,358,475
Bedcloths .. km	1,270,797	1,332,451	71,961	1,030,490	60,245	1,045,422
Bags .. 1,000's	713	82,749	565	58,814	492	70,351
Drawers .. doz.	4,212,950	13,557,860	4,218,103	14,393,095	3,315,784	10,758,377
Crape underwear and shirts .. doz.	210,216	781,268	271,596	790,640	348,525	1,051,324
Cotton thread .. km	291,926	384,371	2,527	320,951	2,062	338,057
Others ..	—	19,639,339	—	21,054,103	—	15,763,929
Total ..	—	191,327,876	—	225,740,853	—	192,837,993

## IMPORTS OF COTTON CLOTH DURING THE FIRST HALF OF 1928.

	First half, 1928		Second half, 1927		First half, 1927	
	sq. yds.	yen	sq. yds.	yen	sq. yds.	yen
Cotton velvets, plushes ..	63,233	149,337	536,227	837,066	103,787	177,789
Flannels ..	30,414	26,810	46,725	31,822	7,239	9,882
Gauze tissues and crepes ..	78,894	55,327	16,394	12,425	93,678	94,903
Plain grey sheetings and shirtings ..	26,751	7,388	316,323	94,408	152,088	45,777
Plain grey ducks ..	403,983	389,134	837,462	393,978	294,408	224,850
Plain grey others ..	308,722	71,338	156,346	52,059	182,611	59,680
Plain bleached sheetings and shirtings ..	398,277	154,671	592,726	230,448	588,023	206,063
Plain bleached Victoria lawns ..	193,036	57,950	19,708	5,267	262,446	70,241
Plain bleached, others ..	926,574	328,886	542,049	193,224	764,737	284,251
Plain, others ..	3,262,754	1,586,925	668,946	409,441	2,251,222	1,095,000
Figured or brocaded ..	88,644	86,006	56,723	45,892	92,153	89,066
Other cotton grey goods ..	8,167	4,780	21,033	17,979	2,744	2,479

## COTTON TRADE STATISTICS

## IMPORTS OF COTTON CLOTH (JAPAN)—continued

	First half, 1928		Second half, 1927		First half, 1927	
	sq. yds.	yen	sq. yds.	yen	sq. yds.	yen
Other bleached	53,118	79,428	27,056	41,879	65,092	76,019
Italian, satins	404,897	309,714	1,116,887	792,375	769,583	543,073
Others	460,675	334,724	1,064,673	576,194	574,466	349,410
Bookbinding cloth	410,750	16,148	607,093	226,541	345,082	207,945
Cotton thread	135,826	328,933	126,133	311,841	161,575	415,568
Others	—	138,567	22,220	112,901	16,640	74,429
Total		4,271,066		4,589,940		3,996,415

## EXPORTS OF COTTON CLOTH BY COUNTRIES DURING FIRST HALF OF 1928.

Exported to	First half, 1928		Second half, 1927	First half, 1927
	sq. yds.	yen	yen	yen
China .. ..	290,636,629	79,407,499	72,432,828	50,927,843
Kwantung .. ..	27,482,406	7,145,681	6,406,347	6,576,748
Hong Kong .. ..	47,171,676	11,397,433	15,536,067	13,890,117
British India .. ..	34,775,841	26,592,502	48,073,290	37,708,396
Straits Settlements .. ..	11,158,193	2,450,633	4,217,135	5,559,665
Dutch Indies .. ..	95,113,259	21,642,578	21,302,401	27,911,318
Philippine Islands .. ..	14,376,187	3,228,104	5,349,229	5,577,819
Siam .. ..	5,641,904	1,154,892	2,363,257	1,675,294
Turkey .. ..	7,212,828	1,352,824	722,534	1,479,062
U.S.A. .. ..	598,351	127,568	109,722	161,630
Chili .. ..	1,440,683	310,295	636,667	501,306
Argentina .. ..	3,690,254	896,525	3,204,784	1,532,354
Uruguay .. ..	305,820	62,886	—	—
Egypt .. ..	34,978,502	7,975,853	12,133,661	11,162,999
Cape Colony .. ..	3,463,041	766,655	1,691,738	951,297
Australia .. ..	5,797,803	1,108,471	2,160,949	2,570,315
New Zealand .. ..	614,331	120,103	257,524	229,800
Hawaii .. ..	572,876	127,249	95,802	155,881
Others .. ..	26,245,641	5,820,766	7,992,815	8,502,220
Total	711,276,225	171,688,537	204,686,750	177,074,064

## IMPORTS OF COTTON CLOTH BY COUNTRIES DURING THE FIRST HALF OF 1928.

Imported from	First half of 1928		Second half of 1927		First half of 1927	
	sq. yds.	yen	sq. yds.	yen	sq. yds.	yen
United Kingdom .. ..	4,064,582	2,370,805	5,595,700	3,639,843	4,688,046	2,600,673
France .. ..	508,911	202,517	—	—	—	—
Germany .. ..	110,181	104,164	—	—	—	—
Switzerland .. ..	1,913,591	873,392	—	—	—	—
U.S.A. .. ..	63,352	63,041	55,734	46,587	107,145	79,884
Others .. ..	49,422	28,499	367,844	252,227	1,409,086	617,916
Total	6,710,039	3,642,418	6,019,278	3,938,657	6,204,277	3,298,473

## IMPORTS OF RAW COTTON DURING THE FIRST HALF OF 1928.

	First half, 1928		Second half, 1927		First half, 1927	
	piculs*	yen	piculs*	yen	piculs*	yen
China .. ..	565,541	27,086,966	701,105	34,688,414	347,021	14,570,639
India .. ..	2,679,419	137,041,253	1,211,684	55,442,882	3,780,321	146,839,066
Straits Settlements .. ..	1,265	20,260	1,971	33,797	4,513	64,954
Dutch Indies .. ..	5,944	80,634	3,545	34,092	13,804	224,028
French Indo-China .. ..	5,881	76,269	27,503	866,956	3,635	40,913
U.S.A. .. ..	1,734,142	110,232,177	2,224,220	132,007,942	4,135,438	211,555,395
Africa .. ..	104,424	10,588,707	120,750	11,168,748	216,267	16,939,443
Others .. ..	19,457	1,531,973	5,672	103,440	2,406	29,951
Total	5,105,747	286,658,239	4,275,225	234,366,271	8,485,760	390,264,389

100 Kiri = 1 Picul = 13 3/4 lbs

## EXPORTS OF COTTON YARN DURING FIRST HALF OF 1925

	First half, 1925		Second half, 1925		First half, 1927	
	kin	ten	kin	ten	kin	ten
China .. ..	4,238,389	4,969,408	30,610	3,520,926	55,076	5,684,700
Kwantung .. ..	481,909	469,942	2,914	305,174	3,659	361,909
Hong Kong .. ..	3,295,053	2,792,516	11,869	1,245,091	20,793	2,492,851
India .. ..	2,119,567	3,860,374	64,136	9,492,556	60,588	16,637,575
Dutch Indies .. ..	565,016	517,525	6,490	641,649	8,291	716,867
Philippines .. ..	186,669	224,620	1,960	272,929	7,835	9,976,520
Siam .. ..	75,392	96,328	—	—	—	—
Egypt .. ..	243,315	181,019	—	—	—	—
Others .. ..	744,888	521,029	18,636	1,660,898	16,438	1,569,639
Total .. ..	11,950,193	18,623,791	136,624	17,084,587	176,344	21,708,521
Bales of 300 kin .. ..	39,833	45,341	45,341	17,084,587	72,113	21,708,521
20's and under .. ..	6,278,926	4,920,776	31,041	2,689,016	38,905	2,962,571
Bales of 300 kin .. ..	20,929	10,348	10,348	2,689,016	14,161	2,962,571
40's .. ..	2,075,420	2,234,776	—	—	—	—
Bales of 300 kin .. ..	6,918	—	—	—	—	—
60's .. ..	2,076,854	3,068,925	105,380	14,305,571	177,939	18,747,478
Bales of 300 kin .. ..	6,923	—	33,163	—	39,612	—
Others .. ..	1,518,993	3,360,312	—	—	—	—
Bales of 300 kin .. ..	5,061	—	—	—	—	—

\* Tan = 12 $\frac{1}{2}$  yds.      Kin = 1 $\frac{1}{2}$  lb.      Poul = 10 $\frac{1}{2}$  lbs.

TABLE SHOWING THE COUNTS OF YARN FOR EXPORT PRODUCED DURING THE FIRST HALF OF 1925

Counts	Bales of 300 kin*	Counts	Bales of 300 kin*
14's and under .. ..	1,245.5	32's doubled .. ..	1,721.0
16's .. ..	1,628.5	40's .. ..	2,900.0
18's .. ..	909.0	42's .. ..	115.0
20's .. ..	16,633.0	42's doubled .. ..	3,956.5
24's .. ..	475.0	43's and over .. ..	7,777.5
28's .. ..	76.0	Unspecified .. ..	618.0
30's .. ..	688.0		
32's .. ..	1,090.0	Total .. ..	39,833.0

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**SPECIFICATION OF PART OF THE COTTON RETURNED AS "SUNDRIES" (IN ACTUAL BALES)**  
**Six Months ending 31st July, 1928, calculated from Actual Returns.**  
**CONSUMPTION.**

	Peruvian	Brazilian	Argentine	West Indian	Mexican	Turkish	Meso- potamian	Sudan	East African	West African	South African	Chinese	Others and unspecified	Total
Great Britain	78,175	28,601	3,673	6,117	2,107	1,348	1,352	45,415	10,723	9,018	1,376	158	6,419	200,551
Germany	9,096	360	3,101	3,100	716	43	—	—	221	892	917	—	—	15,464
France	1,953	786	1,058	269	—	2,009	—	6,250	—	6,537	—	—	—	31,786
Italy	170	—	709	—	—	4,187	—	—	260	—	—	—	16,055	19,055
Belgium	—	—	—	—	—	—	—	—	—	—	—	—	—	1,053
Switzerland	405	—	—	—	—	—	—	—	—	—	—	—	—	405
Netherlands	906	—	10	—	—	—	—	536	8	24,850	—	—	—	1,287
Holland	717	292	—	—	71	428	—	—	—	—	233	—	—	1,052
Austria	511	—	—	—	—	1,980	—	—	—	—	—	—	—	1,052
Czechoslovakia	402	—	—	115	—	366	—	76	174	910	—	—	18	2,810
China	—	—	—	—	—	—	—	—	83	—	—	—	—	3,611
Japan	—	—	—	—	—	—	—	—	—	—	—	—	—	1,071
India	—	—	—	—	—	—	—	—	—	—	—	—	—	3,611
Brazil	—	—	—	—	—	—	—	—	—	—	—	—	—	900,117
United States	—	—	—	—	—	—	—	—	—	—	—	—	—	230,838
Sweden	185	—	—	—	—	—	—	—	2	521	—	—	—	80,570
Spain	—	—	—	—	—	—	—	—	—	—	—	—	—	5,073
Total	80,580	286,806	9,547	9,631	80,161	11,280	1,852	51,297	17,471	42,758	2,556	900,611	51,276	1,363,068

**STOCKS.**

	Great Britain	Germany	France	Italy	Belgium	Switzerland	Poland	Holland	Austria	Czechoslovakia	China	Japan	India	Brazil	United States	Sweden	Spain	Total
Great Britain	12,479	—	—	—	145	—	—	—	—	—	—	—	—	—	—	—	—	—
Germany	1,001	—	—	—	336	—	—	—	—	—	—	—	—	—	—	—	—	—
France	1,791	—	—	—	621	—	—	—	—	—	—	—	—	—	—	—	—	—
Italy	181	—	—	—	295	—	—	—	—	—	—	—	—	—	—	—	—	—
Belgium	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Switzerland	252	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Poland	424	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Holland	750	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Austria	80	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Czechoslovakia	21	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
China	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Japan	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
India	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Brazil	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
United States	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Sweden	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Spain	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Total	13,054	—	—	—	1,507	—	—	—	—	—	—	—	—	—	—	—	—	—

\* Includes Paraguay 806, Haiti 465, Algiers 134, Ecuador 100, etc.

*This table was unavoidably left over in the last issue owing to shortage of space.*

## DETAILS OF GRADES

(Continued from page 366.)

The grade, staple length (a) and tenderability (b) of 12,561,618 bales of cotton ginned in the United States prior to December 1, 1928, estimated from data obtained from the classification of samples representing all of the cotton ginned by certain gins selected to represent the grades and staple lengths of cotton grown in the United States

Total			Total		
Designation	Bales	Per Ct.	Designation	Bales	Per Ct.
Crop total ..	12,561,618	†100.00	Yel tinged total.	13,029	0.10
Upland total ..	12,540,275	99.83	No 2-S G M ..	367	(e)
Extra white total	325,137	2.59	No 3-C M ..	2,290	0.02
No 3-G M. ..	156,748	1.25	No 4-S M ..	6,474	0.05
No 4-S M ..	108,556	0.86	*No 5-M... ..	2,616	0.02
No. 5-M ..	49,338	0.39	*No 6-S L M ..	766	(e)
No 6-S L M. ..	6,935	0.06	*No 7-L M ..	507	(e)
No. 7-L M. ..	3,560	0.03	It yel. stain		
White total ..	11,017,322	87.71	total ..	1,523	0.01
No 1-M F ..	660	(e)	No 3-G M ..	361	(e)
No. 2-S G M ..	42,349	0.34	*No 4-S M ..	427	(e)
No 3-G M ..	1,621,023	12.90	*No 5-M... ..	735	(e)
No 4-S M ..	4,804,287	38.24	Yel stain total	450	(e)
No 5-M ..	3,070,821	24.45	No 3-G M ..	164	(e)
No 6-S L M ..	1,118,313	8.90	*No 4-S M. ..	119	(e)
No. 7-L M. ..	254,020	2.02	*No. 5-M ..	167	(e)
*No. 8-S G O. ..	88,894	0.71	Gray total ..	9,930	0.08
*No. 9-G O. ..	16,955	0.13	No. 3-G M ..	1,147	(e)
Spotted total ..	1,164,329	9.27	No 4-S M. ..	5,822	0.05
No. 3-G M. ..	142,548	1.13	*No. 5-M... ..	2,961	0.02
No 4-S M ..	635,109	5.06	Blue stained total	53	(e)
No 5-M ..	309,516	2.46	*No. 3-G M. ..	42	(e)
*No. 6-S L M. ..	59,462	0.47	*No. 4-S M ..	11	(e)
*No. 7-L M. ..	17,694	0.14	*No. 5-M... ..	—	—
			*No grade (f). ..	8,502	9.07

(a) According to Official Cotton Standards of the U.S. (b) According to Section 5, U.S. Cotton Futures Act. (c) According to report of Bureau of the Census of Dec. 8, 1928. (e) Less than one-hundredth of 1 per cent. \* Untenderable. † Percentages computed to the nearest one one-hundredth of 1 per cent.



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## Reviews on Current Cotton Literature.

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"REPORT ON THE CONDITIONS AND PROSPECTS OF BRITISH TRADE IN INDIA, 1927 TO 1928," by Thos. M. Ainscough, C.B.E., M.Com., H.M. Senior Trade Commissioner in India and Ceylon; obtainable at 3s. 2d. from H.M. Stationery Offices. This is one of the regular reports published by the Department of Overseas Trade. The author is one of the most experienced trade commissioners in the whole service, and no firm doing an Indian trade should be without this useful and comprehensive book of 204 pages. Chapter V deals with the leading imports of all kinds; we publish in the present issue an extract from that section which deals with cotton yarn and cloth. The report on irrigation in the Punjab, on the Lloyd Sukkur Barrage and on the Harbour developments is very instructive.

"INDIAN COTTON FACTS (1928)." Published annually by Toyo Menka Kaisha Ltd., Bombay. This booklet is a valuable collection of statistical matter relating to East Indian cotton and the Indian cotton trade. Some of the more important tables deal with such subjects as the Government cotton crop reports, yield per acre, raw cotton exports, cotton prices, yarns spun in India, piece-goods production, description of goods produced, exports and imports of yarns and piece goods, etc.

"O PROBLEMA DO ALGODÃO" is the title of an address delivered by Dr. Paulo de Moraes Barros before the House of Deputies on December 28th, 1927, which the Brazilian Democratic Party has recently issued in a book of 92 pages. The author is a great Brazilian patriot who has studied the question of cotton growing in Brazil thoroughly, and after his many journeys through the country he advocates cotton growing as one of the crops on which the country should concentrate. Dr. Barros quotes in his address frequently from the two books issued by the International Cotton Federation, viz., *Brazilian Cotton* and *Cotton in North Brazil*, and fully endorses the findings of the International Cotton Mission.

"DIE DEUTSCHE TEXTILINDUSTRIE, 1928-29," published by Verlag für Borsen- und Finanzliteratur A.G., Berlin, W.35 Steglitzer Str. 11, at M. 25. This is a directory (the 26th annual issue) of the German cotton, wool, silk, artificial silk, etc., textile industries, and contains the names of all the limited companies in these industries. This directory not only gives the names of these firms but supplies information on the activities, capital, latest balance sheet, price of shares, dividends, names of directors, etc.

The book is well bound and printed, and contains the names of 1,413 textile firms.

"THE EMPIRE COTTON-GROWING REVIEW," for January, Vol. VI, No. 1 (published by P. S. King & Son Ltd., 14, Great Smith Street, London, S.W.1, at 1s.), contains some interesting articles, among which are "Maarad Cotton," by R. S. Sennitt, "Cotton Diseases in Uganda," by C. G. Hansford, "Results of

"Treatment of Cotton Seed with Sulphuric Acid," G. W. Nye. The last-mentioned account shows that an increase in germination percentage and a more rapid germination takes place. Seed soaked for twenty minutes in concentrated sulphuric acid germinates in four days, as compared with ten days for untreated seed. The percentage germination proved to be 83.9 per cent. and 61 per cent. respectively. The acid treatment of seed has no visible effect on the aftergrowth of the cotton plant, and none on the produce of the plants. This treatment has useful possibilities in ensuring good germination when only small quantities of seed are available; it might also find application in certain field trials where resowings are objectionable.

"NOTE ON THE EARLY HISTORY OF COTTON." The Indian Central Cotton Committee have recently published a pamphlet with the above title describing some samples of cotton materials unearthed during recent excavations at Mohenjo-daro, which lies in the valley of the Indus in Sind, some 200 miles rather east of north of Karachi. It is pointed out that references to cotton in early literature are very few, and that 800 B.C. must apparently be regarded as the earliest authenticated date of a specific reference to cotton. The archaeological evidence shows that the samples of cotton itself retrieved at Mohenjo-daro are very much older than this, as the date which must be assigned to them is about 3000 B.C. Three samples are described; the first was a small fragment of fabric, measuring one-tenth of an inch by three-tenths of an inch, very much tendered and penetrated by fungal hyphae, weighing 2 oz. per square yard, made from 34's counts, and containing 60 ends per inch and 20 picks per inch. The other two samples were small pieces of string found in earthenware; one proved to be a 24-fold cotton cord, composed of two cords each containing 12 strands of 18's counts; and the other, also a 24-fold cotton cord made by the twice doubling of 6-fold cords, the count of each of the six single strands being 14's. Photographs of these samples are given, and photomicrographs of typical fibres extracted from them.

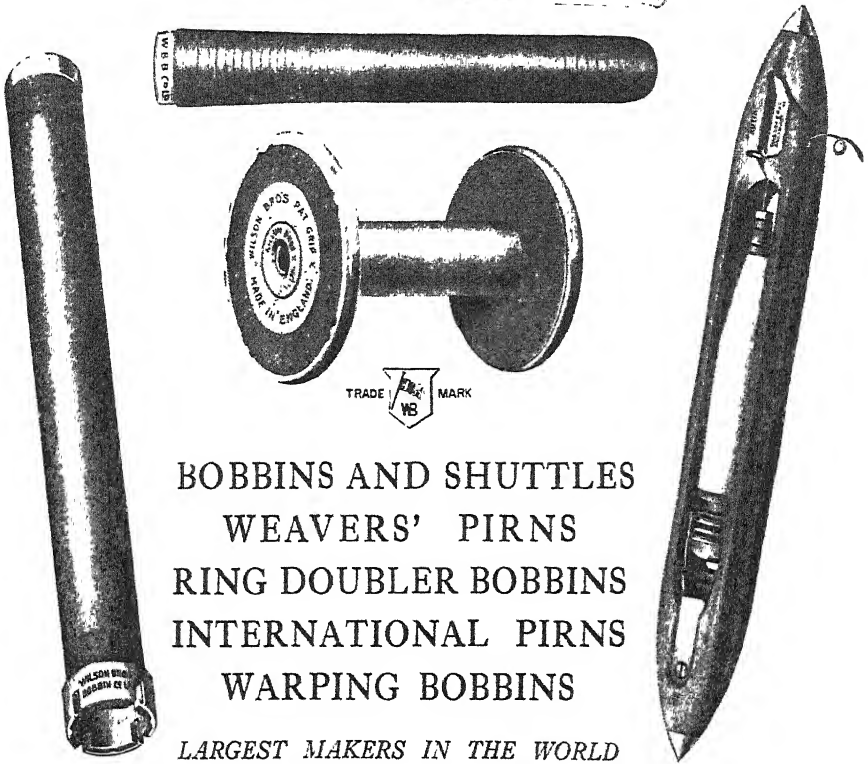
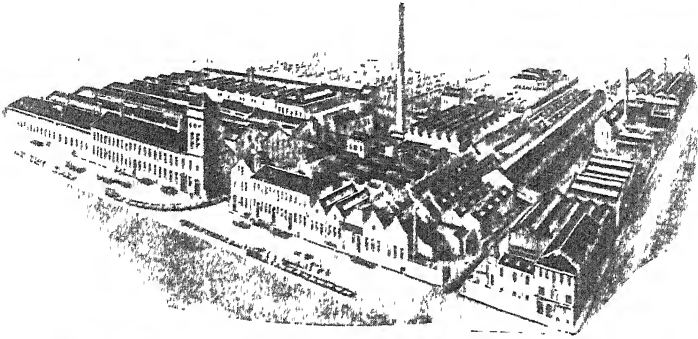
One of these samples was examined in considerable detail in order to ascertain how the properties of the fibre compared with those of present-day cottons, with the further object of assigning the cotton, if possible, to a particular species of *Gossypium*. As a result of this examination the tentative conclusion is drawn that the cotton is not of the *herbaceum* type, but of the *arborescens* type, although the evidence is insufficient for it to be identified as any particular one of the varieties into which Sir George Watt classifies the *arborescens* cottons.

One of the samples of string had a purple colour; a few tests made on this sample showed that the dyestuff which had been used was probably of the madder type.

ERRATUM.—Vol. VII, No. 25, page 125:—

Instead of labour cost for 30's twist, given as 3 cents per lb., read 1.43 cents per lb.; 3 cents is the labour cost for 40's.

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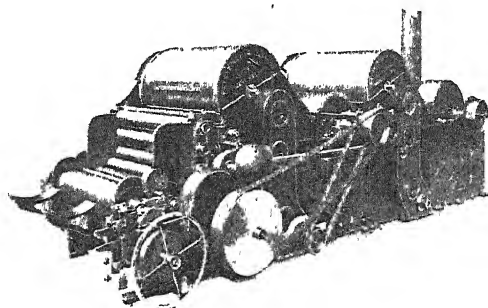
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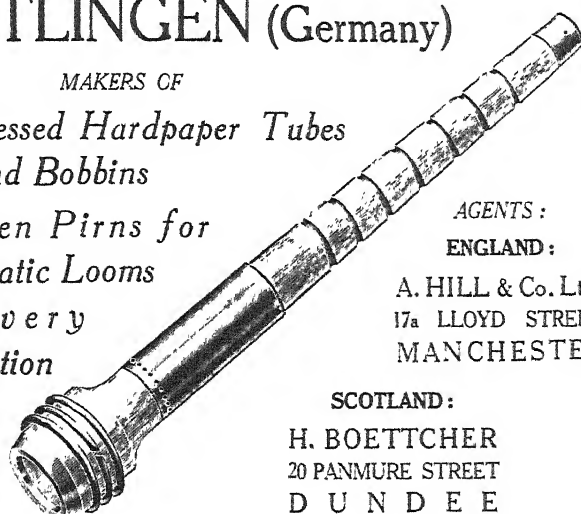
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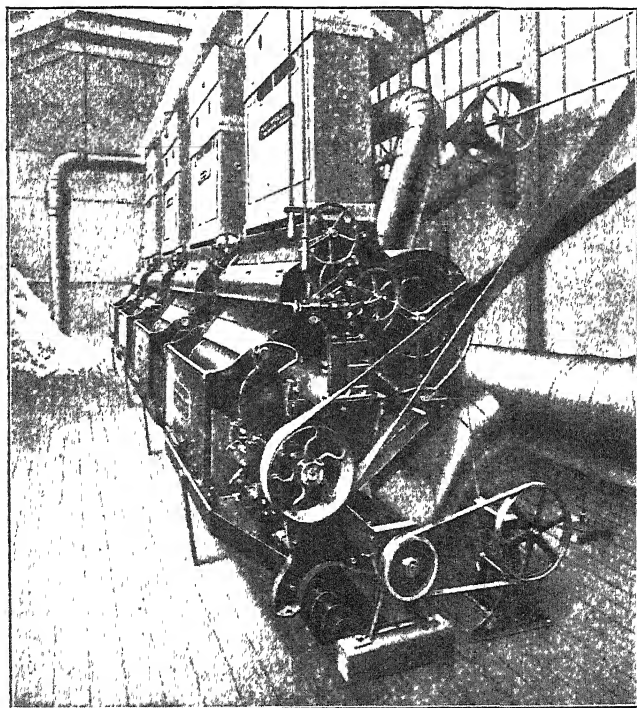
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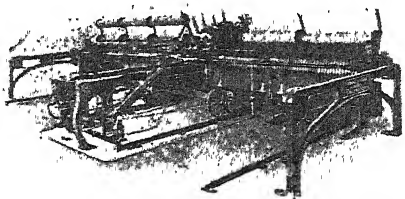
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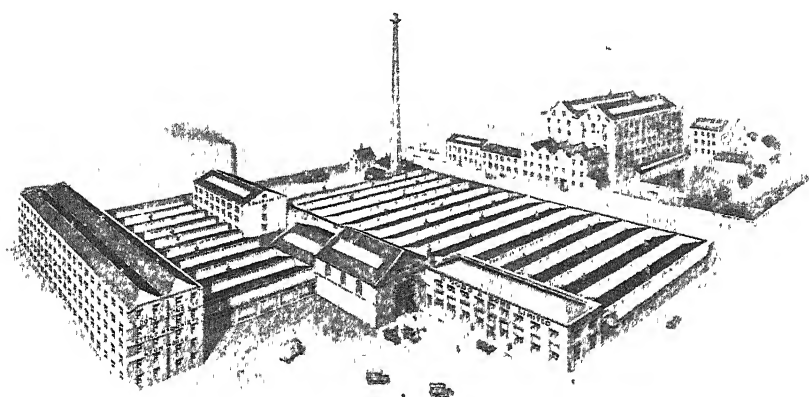
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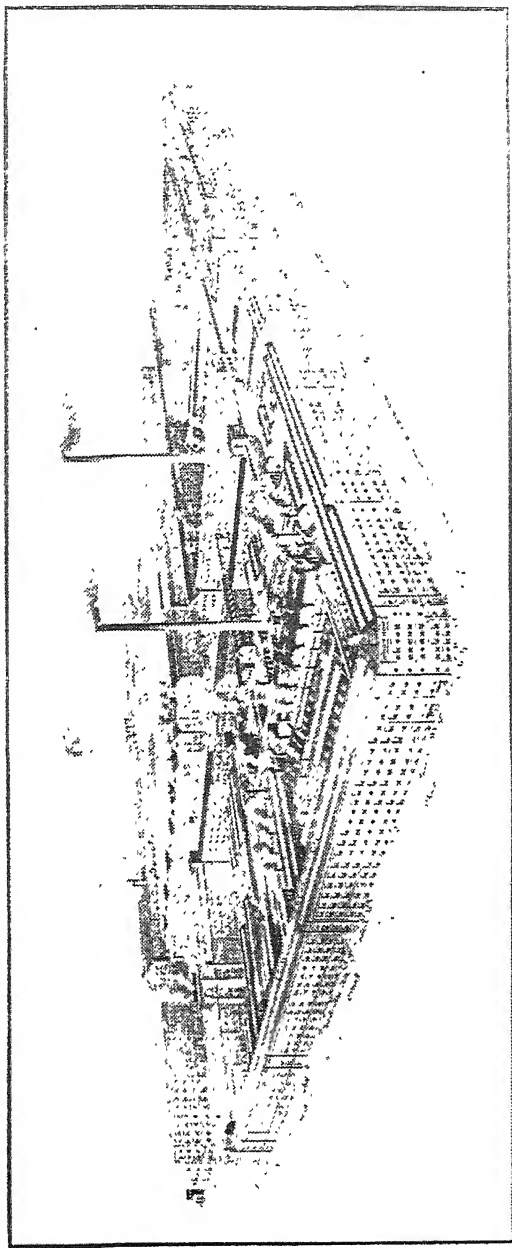
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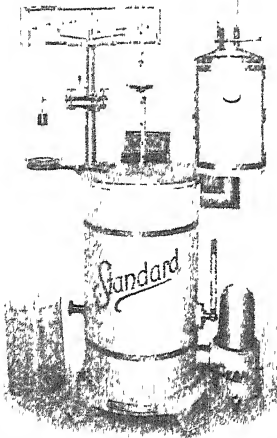
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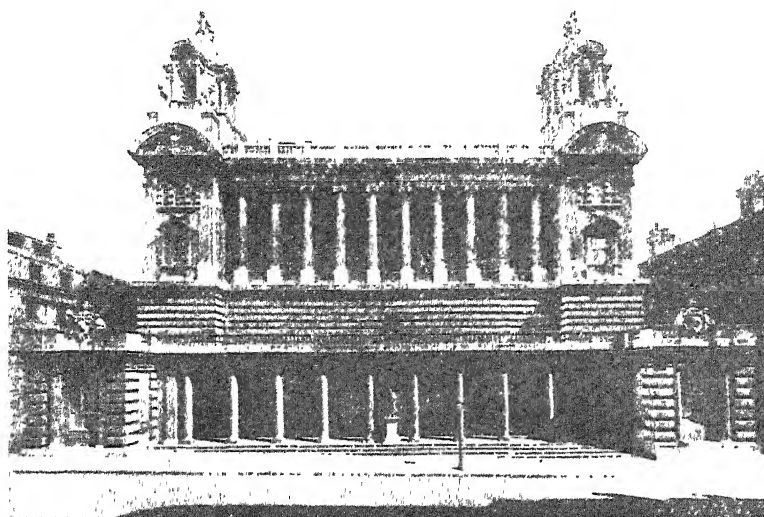
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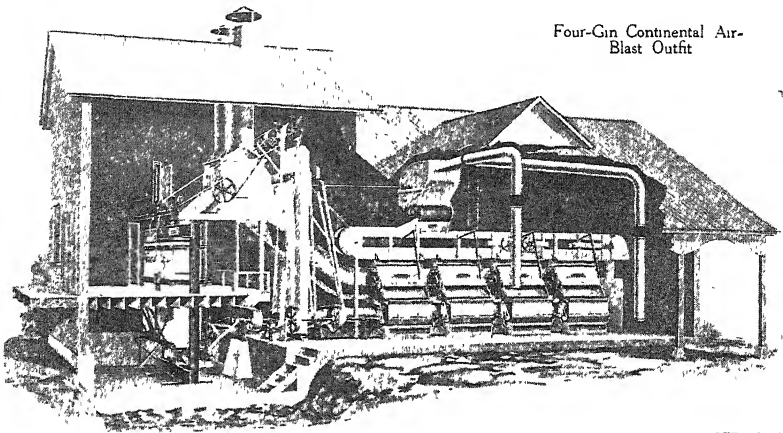


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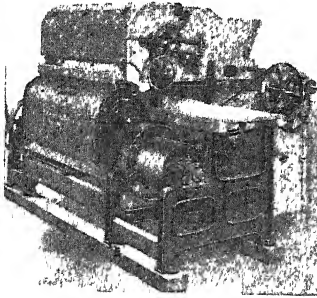
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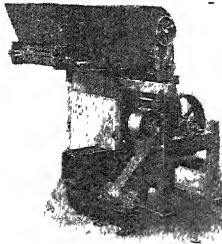
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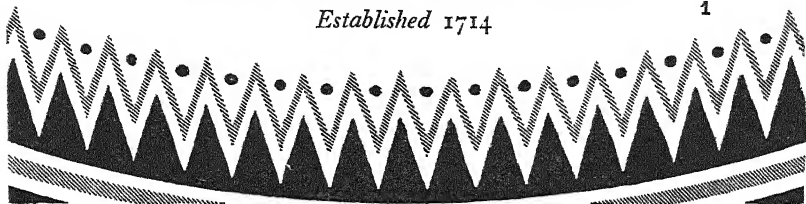
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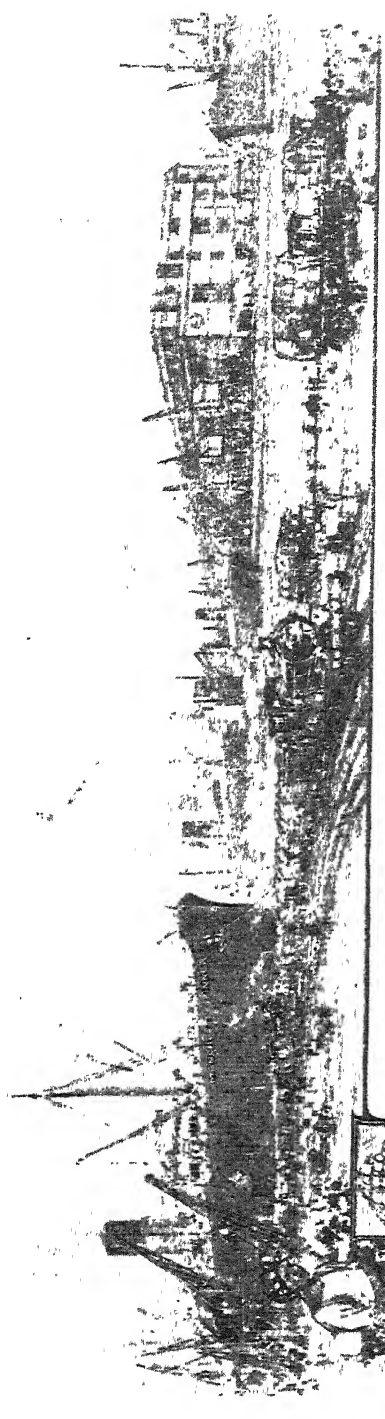
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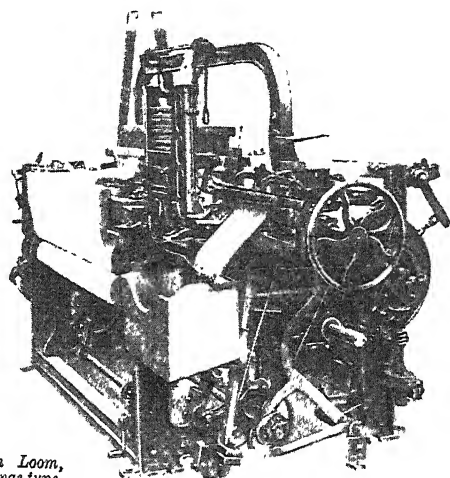
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	PAGE		PAGE
ALBRECHT, F., & Co. . . . .	551	MANCHESTER RAW COTTON CO., LTD. . . . .	1
ALEXANDRIA COMMERCIAL CO. . . . .	488	MANCHESTER SHIP CANAL CO. <i>back cover</i>	
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BAER, HENRY, & Co. . . . .	548	MURRAY GIN CO. . . . .	473
BARBER & COLMAN, LTD. . . . .	510	NEAL, W. C. . . . .	432
BARCELONA INTERNATIONAL EXHIBITION . . . . .	viii	PFLIEGER, PAUL, & Co. . . . .	438
BEHR, OTTO . . . . .	444	PLATT BROS. & Co., LTD. . . . .	550
BOND, MCENANY & Co. . . . .	444	PORT OF MANCHESTER WAREHOUSES	526
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CITY WAREHOUSE WINDOW CLEANING CO., LTD. . . . .	516	REINHART & Co. . . . .	481
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"CASTLE LINE" . . . . .	437	SCOTT & Co. . . . .	437
DEAN & DAWSON, LTD. . . . .	549	SKINNER, THOS., & Co. . . . .	426
DELTA & PINE LAND CO. . . . .	449	SOC. ALSACIENNE DE CONSTRUCTION MÉCANIQUES . . . . .	547
DIXON, R. L., & BROTHER . . . . .	444	SOUTHERN COTTON COMPANY . . . . .	554
DOBSON & BARLOW, LTD. . . . .	515	STANDARD MARINE INSURANCE CO. . . . .	478
DODD, S., & SONS . . . . .	508	STEWART BROTHERS COTTON COMPANY . . . . .	443
DRAPER CORPORATION . . . . .	458	STUBBS, JOSEPH, LTD. . . . .	552
ECONOMOU, G. D., & Co. . . . .	487	TARVER, STEELE & Co. . . . .	450
EGYPTIAN PRODUCE TRADING CO. . . . .	482	TAYLOR, LANG & Co., LTD. . . . .	551
FAWCETT, PRESTON & Co., LTD. . . . .	495	TETLOW, HENRY, & SONS . . . . .	512
FRANÇOIS, L. F., & CIE. . . . .	449	TEXAS FARM BUREAU . . . . .	474
GREER STAPLE COTTON COMPANY . . . . .	438	TEXTILE DEVELOPMENT CO. . . . .	467
HETHERINGTON, JOHN, & Co., LTD. . . . .	547	"TEXTILE, LA," SOCIÉTÉ CO-OPÉRATIVE . . . . .	548
HOWARD & BULLOUGH, LTD. . . . .	545	TEXTILE WEEKLY . . . . .	529
HUDSPETH, G. J., & Co. . . . .	450	TWEEDALES & SMALLEY (1920), LTD. . . . .	542
HUSNI, SONS & CHINASSI . . . . .	549	UNIVERSAL WINDING CO. . . . .	v
JOANNIDES, J. G., & Co. . . . .	491	VICKERS (CRAYFORD), LTD. . . . .	iii
JONES, A. LYNTON, & Co. INC. . . . .	444	WELD & Co. . . . .	526
KENYON, JAMES, & SON, LTD. . . . .	544	WESTERN UNION TELEGRAPH CO. . . . .	443
KUPFER, H. . . . .	487	WILSON BROS. BOBBIN CO., LTD. . . . .	541
LANCASTER & TONGE . . . . .	491	WILSON, S. B. & Co. . . . .	449
LAWLER, H. H., & Co. . . . .	443	WOOLLEY, JAMES, SONS & Co., LTD. . . . .	516
LEES, ASA, & Co., LTD. . . . .	502	WORRALL, JOHN, LTD. . . . .	512
LIVERPOOL COTTON ASSOCIATION . . . . .	543		
LORD BROS., LTD. . . . .	496		

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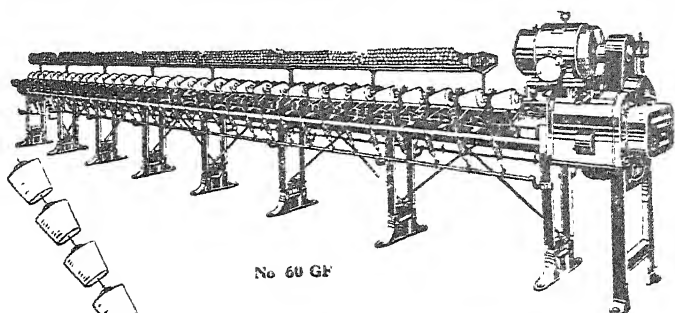
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# CONTENTS

---

	PAGE
COMMITTEE'S COMMUNICATIONS .. .. .	397
JOINT EGYPTIAN COTTON COMMITTEE MEETING; INTERNATIONAL COTTON COMMITTEE MEETING, BARCELONA COTTON CONGRESS.	
STATE OF TRADE REPORTS . . . . .	398-411
AUSTRIA, 398, BELGIUM, 401, CHINA, 401, CZECHO-SLOVAKIA, 402; ENGLAND, 404, FRANCE, 405, GERMANY, 406; HOLLAND, 408; HUNGARY, 408, ITALY, 409; SPAIN, 410; SWITZERLAND, 525; U.S.A., 411	
AUTOMATIC LOOM ENQUIRY .. .. .	411
PANEL OF ARBITRATORS (Revision) . . . . .	412-415
INTERNATIONAL COTTON STATISTICS (TO JANUARY 31). . . . .	416-424
REMARKS, 416; SHORT-TIME TABLE, 417, CONSUMPTION TABLE, 418-419, COTTON MILL STOCKS TABLE, 420-421; SPINDLE TABLE, 422-423, SPECIFICATION OF SUNDRIES COTTON, 424	
COTTON GROWING IN NEW COUNTRIES .. .. .	427-431
ARGENTINE, 427; BRAZIL, 427; FRENCH MOROCCO, 428; IRAQ, 428, MEXICO, 429, SUDAN, 429; UGANDA, 430; UNION OF SOUTH AFRICA, 431; St VINCENT, 431.	
AMERICAN COTTON .. .. .	432-478
COTTON STANDARDS CONFERENCE, 433, NET WEIGHT AND COTTON TARE STANDARDIZATION, 434, PRELIMINARY FINAL GINNING REPORT, 435; RAW COTTON TARIFF PROPOSALS, 436, MECHANICAL HARVESTING OF COTTON IN TEXAS, 439, SOIL EROSION IN TEXAS, 440, PROPOSAL TO CHANGE STAPLE LENGTH BASIS, 441-452, CHEAP BASIS FOR COTTON, 453-459; PINK BOLL-WORM, 459, COTTON GRADE AND STAPLE REPORT, 460-461; COTTON SOLD "ON CALL," 462, COTTON ACREAGE IN TEXAS, 464, CROP NEWS, 465-470, U.S. CONSUMPTION FOR MARCH, 470, DATES OF COTTON GRADE AND STAPLE REPORTS, 470; WEIGHT OF COTTON BALES, 471; FERTILIZER SALES, 471; COTTON GROWING DEMONSTRATIONS, 472, INDICATED WEEVIL ACTIVITY, 472, BOLL WEEVIL SURVIVAL, 477; U.S.A. EXPORTS OF COTTON, 478.	
EGYPTIAN COTTON .. .. .	479-492
JOINT EGYPTIAN COTTON COMMITTEE, 479, COTTON GROWING IN UPPER EGYPT, 480; GOVERNMENT CROP REPORT, 484, MEETING THE COMPETITION OF ARTIFICIAL SILK, 484; EGYPTIAN COTTON CONSUMED IN U.S.A., 486; EGYPTIAN GINNINGS, 486; MARKET REPORTS, 489; EXPORTS BY COUNTRIES OF EGYPTIAN COTTON, 492.	

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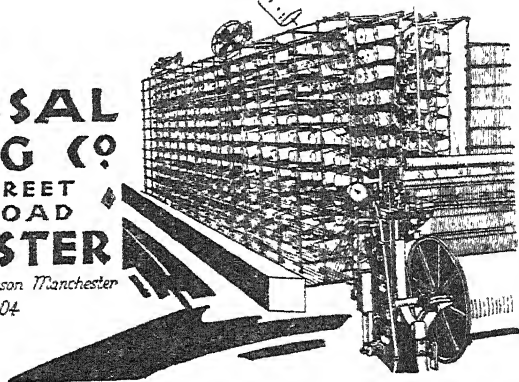
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CONTENTS—*Continued.*

	PAGE
EAST INDIAN COTTON . . . . .	493-495
FINAL COTTON FORECAST, 1928-29, 493, COTTON PRESS RETURNS, 495	
TECHNICAL SECTION . . . . .	497-511
COST OF MANUFACTURING AND THE MULTIPLE SYSTEM OF LOOM OPERATION, 497-504, THE WEAVER LOOM BALANCE, 504, CORK SPINNING ROLLERS, 511, NEW HIGH DRAFTING FRAME, 511.	
COTTON MILL NOTES . . . . .	512-522
COLOMBIA, 513; JAPAN COTTON INDUSTRY, 513; CHINA, 514, INDIA, 517; U.S.A. SOUTHERN MILLS, 518, NIGHT SHIFT ELIMINA- TION EFFECT, 520, BRAZIL, 521, TOYODA AUTOMATIC LOOM, 521	
MISCELLANEOUS . . . . .	523-526
WORLD PRODUCTION OF RAYON, 523; MIDDLETON COTTON GIN, 524, COTTON FABRICS CONSUMED BY U.S. TYRE INDUSTRY, 524, STATE OF TRADE, SWITZERLAND, 525	
COTTON TRADE STATISTICS . . . . .	527-539
BRAZIL, EXPORTS OF COTTON YARNS, CLOTH, AND RAW COTTON, 527, INDIA, YARNS AND CLOTH PRODUCED, 530-531; JAPAN, EXPORTS OF GREY, PRINTED, DYED, AND BLEACHED CLOTHS FOR YEAR 1928, 532, U.S.A., EXPORTS OF COTTON YARNS AND CLOTH FOR 1928, 534, U.S.A., IMPORTS OF COTTON YARNS AND CLOTH FOR 1928, 537; ENGLAND, COTTON YARN AND CLOTH EXPORTS TO MARCH, 1929, 539; GERMANY, COTTON CLOTH EXPORTS, 1928, 539	
REVIEWS OF CURRENT COTTON LITERATURE . . . . .	540

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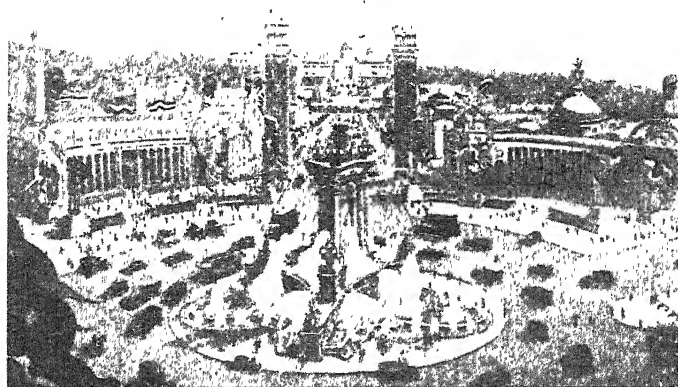
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# Barcelona International EXHIBITION 1929

THE WORLD'S MOST IMPORTANT  
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# INTERNATIONAL COTTON BULLETIN

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## JOINT EGYPTIAN COTTON COMMITTEE MEETING.

THE next meeting of the Joint Egyptian Cotton Committee will take place on May 23rd, at the Palace Hotel, Brussels.

Among the subjects to be considered are:—

Data on Damp in Cotton.

The Details of the Mixing Law.

Particulars of the Development of New Cotton Varieties.

General.

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## INTERNATIONAL COTTON COMMITTEE MEETING.

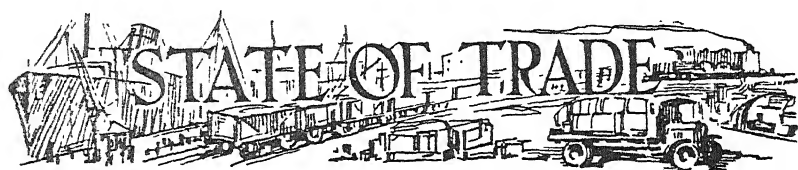
A meeting of the International Cotton Committee will be held on the 24th May, at the Palace Hotel, Brussels, at which several important reports will be presented for consideration.

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## BARCELONA COTTON CONGRESS.

The date of the next International Cotton Congress has not yet been definitely fixed, but will commence on either September 16th or 18th, terminating on the 21st or the 22nd September.

The Congress has been arranged at Barcelona in order to enable delegates to visit the International Exhibition taking place in that city from May to September.



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## REPORTS FROM ASSOCIATIONS.

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### AUSTRIA.

#### SPINNING.

Market conditions for the months of December, 1928, and January, 1929, were much less favourable than during the previous quarter, as the sales of yarns declined then by almost 50 per cent. Business revived a little in February, but it did not reach the average total sales for the months of September–November, 1928. At the end of February the total sales represented roughly an aggregate delivery of 18 weeks. For March there is not yet any reliable information at hand.

An organized limitation of production was not carried out, but some reduction was made by individual concerns. The present rate of production is, on the average, 65 to 70 per cent. of the full capacity.

The figures for foreign trade now at hand refer only to the first three quarters of the year 1928, and show for this period a total import of cotton yarns of 10,790 metric cwts., as against 10,034 metric cwts. for the same period in the previous years. On the other hand, the exports were 94,584 cwts., as compared with 104,677 cwts. for the same period during the previous years. The total exports therefore show a reduction of about 10 per cent. However, these differences are much greater in relation to the various markets, as exports to Germany have declined from 20,670 to 11,109 cwts., and those to Hungary from 34,525 to 18,415 cwts. These reductions were, nevertheless, partly made good by an artificially created export trade with Roumania, Bulgaria and Holland, which proved unremunerative.

The tendency of the prices for the home and export trades is greatly conducive to losses, and it is therefore doubtful whether, under these circumstances, concerns will be able to keep up their present rate of production. There are at present no signs of a prospective recovery.

#### WEAVING.

There is no statistical information available regarding the extent of production, but it is possible to estimate that the weavers are supplied with orders for about four to six weeks. Whilst additional looms have been put into use by some firms (this especially for the making of coloured fabrics and goods of a special character), other concerns have again had to reduce their turn-

over. One of the larger weaving mills has closed down altogether. Weavers work on the average at about 70 per cent. of their capacity.

The imports to Austria for the first three quarters of the year 1928 are as follows:—

		(Metric) cwt.	As against cwt. in 1927
Grey cloths ... ..	49,761	..	45,470
Bleached and mercerised goods ..	7,063	...	7,617
Dyed goods ... ..	2,948	..	2,362
Printed goods ... ..	2,327	...	3,308
Coloured fabrics ... ..	13,692	...	13,659
Total ... ..	<u>75,791</u>	...	<u>72,416</u>

At the same time there were exported:—

		(Metric) cwt.	As against cwt. in 1927
Grey cloths ... ..	1,318	...	4,352
Bleached and mercerised goods ...	3,504	...	3,708
Dyed goods ... ..	1,416	...	1,604
Printed goods ... ..	11,074	..	10,233
Coloured fabrics ... ..	13,692	...	13,659
Total ... ..	<u>31,004</u>	...	<u>33,556</u>

When the latter export figures are taken into consideration it should be borne in mind that, for the period in question for the year 1928, out of the total exports 11,994 cwts., or roughly 39 per cent., were exported under the so-called "Veredlungsverkehr" clause, viz., that these goods were only finished at home, and therefore do not come under the head of goods manufactured in the country.

Likewise, as regards cotton goods, prices have shown an unsatisfactory tendency, and this not only for greys but also for white and coloured goods. The depression in prices which was caused by the imports is being heightened by the competition among the Austrian weavers themselves, and is causing a continued decrease in the weaving margin. Under these circumstances the conditions of payment in the weaving trade show an even tendency to deteriorate.

The prospects of business for the near future are rather uncertain, and no signs have appeared which may justify the hope that a change will take place in these generally quiet market conditions.

*The following is the original report in German:—*

(1) BAUMWOLLSPINNEREIEN.

Die Absatzverhältnisse haben sich in den Monaten Dezember 1928 und Januar 1929 gegenüber den vorausgegangenen 3 Monaten wesentlich verschlechtert, da die Garnverkäufe auf nahezu die Hälfte gesunken sind. Erst im Februar was das Geschäft wieder lebhafter, hat aber das durchschnittliche Ausmass der Verkäufe in den Monaten September–November 1928 nicht erreicht. Der gesamte Verkaufsstand hat Ende Februar eine rund 18-wöchentliche Gesamtbelieferung umfasst. Für den Monat März liegen noch keine verlässlichen Angaben vor.

Eine organisierte Produktionseinschränkung wurde nicht durchgeführt, doch haben individuelle Betriebsreduktionen statt-

gefunden. Im Durchschnitt durfte der gegenwärtige Betriebsumfang in einer Schichte cca. 65–70% der Vollerzeugung betragen.

Die Ziffern des Aussenhandels liegen vorläufig nur für die ersten 3 Quartale des Jahres 1928 vor und zeigen für diese Periode eine Gesamteinfuhr in Baumwollgarnen von 19,790 Meterzentner gegenüber 19,034 meterzentner in der gleichen Zeit des vorausgegangenen Jahres. Andererseits wurden ausgeführt 94,584 q. gegen 104,677 q. in der gleichen Periode des Vorjahres. Somit zeigt der Gesamtexport einen cca. 10%igen Rückgang. — Wesentlich grosser sind allerdings die Verschiebungen in Bezug auf die einzelnen Absatzgebiete, da die Ausfuhr nach Deutschland von 20,670 auf 11,109 q. und nach Ungarn von 34,525 auf 18,415 q. zurückgegangen ist, welcher Ausfall durch eine forcierte und mit Verlust verbundene Ausfuhr nach Rumänien, Bulgarien und Holland teilweise wettgemacht wurde.

Die Preisbildung ist sowohl im Inlands- wie im Export-Geschäft eine ausgesprochen verlustbringende, und es ist daher zu bezweifeln, ob die Betriebe unter solchen Umständen in der Lage sein werden, ihren bisherigen Betriebsumfang aufrecht zu erhalten. Irgendwelche Anzeichen für eine Besserung der Konjunktur sind vorläufig nicht zu erkennen.

## (2.) BAUMWOLLWEBEREI.

Wenn auch ziffernmässige Angaben über den Produktionsumfang nicht vorliegen, so kann doch schätzungsweise angenommen werden, dass die Webereien für cca. 4–6 Wochen mit Aufträgen versehen sind. Während in einigen Betrieben Webstühle, u.zw. namentlich für buntgewebte und Spezial-Artikel zugestellt wurden, haben andere Betriebe wieder eingeschränkt. Eine grossere Weberei ist gänzlich abgestellt worden. Im Durchschnitt durften die Webereien mit einer ungefähr 70%igen Ausnutzung ihrer Kapazität arbeiten.

In den ersten 3 Quartalen des Jahres 1928 wurden nach Oesterreich eingeführt:—

	q.	q. im Jahre 1927
Rohe Gewebe ... ..	49,761	45,470
Gebleichte und merzerisierte Gewebe	7,063	7,617
Gefärbte Gewebe ... ..	2,948	2,362
Bedruckte Gewebe ... ..	2,327	3,308
Buntgewebte Waren ... ..	13,692	13,659
Daher zusammen ... ..	<u>75,791</u>	<u>72,416</u>

Dem gegenüber wurden in der gleichen Zeitausgeführt:—

	q.	q. im Jahre 1927
Rohe Gewebe ... ..	1,318	4,352
Gebleichte und merzerisierte Gewebe	3,504	3,708
Gefärbte Gewebe ... ..	1,416	1,604
Bedruckte Gewebe ... ..	11,074	10,233
Buntgewebte Waren ... ..	13,692	13,659
Zusammen ... ..	<u>31,004</u>	<u>33,556</u>

Bei Beurteilung der letztangeführten Ausfuhrziffern muss jedoch berücksichtigt werden, dass in der Ermittlungsperiode des Jahres 1928 von der Gesamtausfuhr 11,994 q. oder rund 30% auf den

sogenannten Veredlungsverkehr, demnach auf Gewebe entfallen die im Inlande nicht erzeugt sondern bloss ausgetüftet wurden.

Auch in den Baumwollgeweben hat sich die Preislage unbefriedigend entwickelt, was diesmal nicht nur für die Rohware, sondern auch für Weiss- und Buntware gilt. Der von den Importen ausgeübte Preisdruck wird verschärft durch den Wettbewerb der österreichischen Webereien untereinander und führt zu einem fortgesetzten Rückgang der Webmarge. Auch die Zahlungskonditionen zeigen unter diesen Verhältnissen eine stetige Tendenz zur Verschlechterung.

Die geschäftlichen Aussichten der Webereien sind für die nächste Zukunft unsicher, doch ist auch hier keine Veranlassung gegeben, eine entscheidende Wendung in der allgemeinen k. k. Marktgestaltung zu erwarten.

*(Verein der Baumwollspinner und Weber Oesterreichs.)*

## BELGIUM.

The situation in the Belgian cotton industry has remained almost unchanged during the last few months. In order not to force the adoption of short time it has been necessary for spinners and weavers to accept extremely low prices. Exports are very difficult; foreign competition causes heavy sacrifices.

The spinning section has orders in hand for approximately three months, and the stock is about normal. Organized short time has not been adopted up to the present.

Wages have not been subjected to any alteration, but most of the important mills have made family grants to workers who are the father or mother of a family. These allocations are paid through the medium of a compensation fund to which the mills have engaged to deposit a levy of 2 per cent. of the wages.

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*The original report in French follows:—*

La situation de l'industrie cotonnière belge ne s'est guère modifiée au cours de ces derniers mois. Pour ne pas être contraints de chômer les filateurs et les tisseurs doivent traiter à des prix extrêmement bas. L'exportation est des plus difficiles; la concurrence étrangère consent les plus lourdes sacrifices.

La filature a un carnet d'ordres d'environ 3 mois et le stock est à peu près normal. L'organisation du chômage n'est pas envisagée en ce moment.

Les salaires n'ont pas subi de modifications, mais la plupart des usines importantes remettent des allocations familiales aux ouvriers pères ou mères de famille.

Ces allocations sont payées par l'intermédiaire d'une caisse de compensation à laquelle les industriels s'engagent à verser une cotisation de 2 pour cent des salaires.

*(Société Cooperative La Textile.)*

## CHINA.

According to the U.S. Agricultural Commissioner at Shanghai, cotton mills in China continue to operate at full capacity, and

there is no slackness in the demand for cotton yarn. Mills are behind in their deliveries and sold out until May or June. There is an extreme shortage of unsold spot yarn and a temporary corner on the yarn exchange where quotations on immediate deliveries are \$8.00 per bale higher than on April deliveries. . . . Although the boycott propaganda against Japanese goods has continued, the operations of Japanese mills in China have not been curtailed. Chinese spinners complain that the current margins in the spinning industry permit Japanese mills to underquote Chinese mills.

## CZECHO-SLOVAKIA.

### COTTON-SPINNING SECTION.

In the first quarter of the year 1929 the production of the cotton mills reached a normal capacity of 100 per cent. About 15 per cent. of the spindles, in view of their special technical installation, worked overtime. They were also operated partly during the second shift. Several of these factories supply requirements of their own weaving and finishing factories almost exclusively, and have sold hardly any yarn.

In contrast with the overproduction of the above-mentioned factories, several of the other cotton mills carried out reductions in production, so that the average output on both sides corresponded to 100 per cent. of the normal rate of production.

The present state of yarn quotations is absolutely unsatisfactory and no longer covers the costs of manufacturing in a large number of cotton mills. To speak of a profit is out of the question, for, after taxes and other social charges have been paid, there is nothing left. Neither the present business conditions nor the future prospects are giving any cause for satisfaction.

Stocks of yarn are constantly increasing. The volume of orders, which during the early months of the season usually show a tendency to increase, is this year absolutely inadequate, smaller even than in the preceding year, and appreciably reduced in comparison with 1927. It will likely correspond to a production of six to seven weeks.

The export of cotton yarns has decreased in extraordinary proportions.

### WEAVING.

In the weaving section business is also unsatisfactory, as the demand corresponds in no way with the capacity of production. The export trade in manufactured goods has, moreover, suffered appreciable losses. Insufficient and profitless as it is, this situation will become still worse through other unfortunate occurrences, such as suspensions of payments, bankruptcies, etc. Thus prospects for the near future cannot be described as propitious.

The retrogression in the condition of the Czecho-Slovakian cotton industry, as compared with that of past years, is also demonstrated by statistical returns. Exports of cotton goods to most countries have followed a retrograde direction, and it was only through the exports sent to the United States and Holland that appreciable results were secured.

In comparison with 1927, the total export of cotton yarns shows a decrease of about 19 per cent. of the export of other cotton goods

and 7 per cent. of the total. The main portion of this decrease in yarn export is almost entirely due to transactions with Germany, Poland and Hungary, the reason for this being, for the first-named country, unsatisfactory domestic conditions and for the other two the progress they make in providing for their own requirements.

The imports of manufactured cotton goods by Czecho-Slovakia have remained almost unchanged.

Imports of raw materials decreased, in comparison with the previous year, by about 228,000 cwts., viz., 14.3 per cent. According to the statistical returns for the Export Trade the average price of a kilogram of raw material which has been manufactured at home is kc. 16.16 (14.23), that of the exported yarn kc. 20.37 (18.23) and that of other manufactured cotton articles kc. 50.51 (46.80). The average increase in the price of the raw material therefore amounts to 13.6 per cent. of the increase in price of the exported yarn and 11.7 per cent., and for the manufactured article 7.0 per cent. The returns for 1928 of the export woollen trade (raw and manufactured wool) show a turnover of about 413 million kc. against about 411 million kc. in the year 1927.

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*The original report in German follows:—*

#### BAUMWOLLSPINNEREI.

In der Baumwollspinnerei entsprach die Beschäftigung im ersten Quartal 1929 einer 100%igen Normalkapazität; cca. 15% der Spindeln arbeiteten mit Rücksicht auf ihre betriebstechnischen Einrichtungen mit Ueberzeit, teilweise auch in zweiter Schicht. Mehrere dieser Betriebe sind fast ausschliesslich Selbstversorger ihrer Webereien und Veredlungsbetriebe und bringen fast gar kein Garn zum Verkauf.

Entsprechend der Mehrproduktion dieser letztgenannter Betriebe haben einige andere Spinnereien Betriebsreduktionen durchgeführt, sodass die Summe beider der 100%igen Normalproduktion entspricht.

Die Garnpreisgestaltung ist vollkommen ungenügend und deckt in der überwiegenden Anzahl der Baumwollspinnereien nicht mehr die Selbstkosten. Von einem Gewinn kann bei entsprechender Abschreibung und mit Rücksicht auf die bestehenden Steuern und sozialen Lasten wohl in keinem Falle mehr gesprochen werden. Weder der laufende Geschäftsgang noch die Aussichten für die Zukunft sind zufriedenstellend.

Die Garnlager sind im konstanten Ansteigen begriffen. Die Auftragsbestände, die sonst in diesen Monaten als Beginn der Saison stark aufsteigende Tendenz haben, sind heuer vollkommen ungenügend, kleiner als im Vorjahre und ganz wesentlich vermindert gegen 1927. Sie dürften einer 6-7 wöchentlichen Erzeugung entsprechen.

Der Export an Baumwollgarnen ist ausserordentlich zurückgegangen.

#### WEBEREI.

Auch in der Baumwollweberei ist die Beschäftigung ungenügend, da die Nachfrage keinesfalls der Erzeugungskapazität entspricht. Der Export an fertigen Waren hat wesentliche Einbusse erlitten.

Die an sich ungenügende und gewinnlose Beschäftigung wird noch verschärft durch wesentliche Verluste, infolge Zahlungseinstellungen, Kurzen, etc. Die Aussichten für die nächste Zukunft können auch im nicht als günstig bezeichnet werden.

Der Rückgang in der Konjunktur der csl. Baumwollindustrie gegenüber dem vorhergehenden Jahr kommt auch in den Ziffern der Aussenhandelsstatistik zum Ausdruck. Die Ausfuhr von Baumwollerzeugnissen hat nach den meisten Ländern einen Rückgang erfahren und nur bei der Ausfuhr nach U.S.A. und den Niederlanden konnten bemerkenswerte Erfolge erzielt werden.

Die gesamte Baumwollgarnausfuhr hat sich um etwa 19% die Ausfuhr von anderen Baumwollerzeugnissen um etwa 7% der Menge nach gegenüber 1927 verringert. Der Hauptanteil der Verringerung der Garnausfuhr entfällt fast ausschliesslich auf Deutschland, Polen, und Ungarn, wobei für die ersteren Länder die schlechte Wirtschaftlage, in letzterem Lande auch die fortschreitende Selbstversorgung massgebend war.

Die Einfuhr von Baumwollerzeugnissen in die Tschechoslovakei ist fast unverändert geblieben.

Die Rohmaterialeinfuhr vermindert sich gegenüber dem Vorjahre um etwa 228,000 q. d.s. 14.3%. Nach den Wertziffern der Aussenhandelsstatistik, stellt sich der Durchschnittspreis eines Kilogrammes des im Inlande verarbeiteten Rohmaterials auf Kc. 16.16 (14.23), der der ausgeführten Garne auf Kc. 20.37 (18.23) und der der anderen ausgeführten Baumwollerzeugnisse auf Kc. 50.51 (46.80). Die Erhöhung des durchschnittlichen Rohmaterialpreises beläuft sich demnach auf 13.6% der Preisaufstieg für die ausgeführten Garne auf 11.7% und für die Fertigfabrikate auf 7.9%. Die Bilanz des Aussenhandels mit Baumwolle und Waren daraus, weist im Jahre 1928 ein Aktivum von ungefähr 413 Mill. Kc. auf gegenüber ungefähr 411 Mill. Kc. im Jahre 1927.

*(Czecho-Slovak Textile Manufacturers' Association.)*

## ENGLAND.

### SPINNING SECTION.

Little change has taken place in the American spinning section of the trade since the last report. Actual production, as compared with normal, has been in the neighbourhood of 75 per cent., although, generally speaking, the prices ruling leave much to be desired.

So far as the Egyptian spinning section of the trade is concerned, there has been a falling-off in employment, due to the organization of curtailment of production at the mills in the Bolton area, amounting to 16 hours per week, which has been in operation since the middle of February.

*(Federation of Master Cotton Spinners' Associations Ltd.)*

### WEAVING SECTION.

The state of trade during the past three months has not shown any improvement. Many looms have been idle, and prices obtainable have not been satisfactory.

a decrease *(Cotton Spinners and Manufacturers' Association.)*

## FRANCE.

No important change has taken place in the French cotton industry since the publication of the INTERNATIONAL COTTON BULLETIN, No. 26.

Stocks, which vary in quantity according to districts and qualities, are not diminishing, and, moreover, weigh sufficiently heavily on the market to affect the spinner. Orders on hand can again be estimated on the whole to be about three months. It has not been found practical to organize short time, but a certain reduction in production has taken place owing to individual action.

As to prices, they still continue to remain distinctly poor, notably in the American section.

An increase of wages took place last January in Normandy to the extent of 4 per cent. on the list price, which represents a rise of 3 per cent. of the preceding wages paid.

The figures of exports and imports of yarns and cloth during 1928 follow in the original French report:—

Aucune modification essentielle ne s'est produite dans la situation de l'industrie cotonnière française depuis la publication du No. 26 de l'INTERNATIONAL COTTON BULLETIN.

Les stocks, d'une importance variable suivant les régions et selon les sortes, ne diminuent pas et surtout pour la filature pèsent assez lourdement sur le marché. Les engagements peuvent encore être estimés, dans l'ensemble, à environ 3 mois. Il n'est pas pratiqué de chômage concerté, mais une certaine réduction de la production a lieu à titre individuel.

Quant aux prix, ils continuent à être franchement mauvais, notamment en ce qui concerne la filature Américaine.

En Normandie, il a été accordé en Janvier dernier une augmentation de salaires de 4 pour cent du taux de base, ce qui représente environ 3 pour cent des salaires précédemment payés.

## COMMERCE EXTERIEUR.

	(Année entière)	
	Quintaux Métriques	Quintals
	1927	1928
I—IMPORTATIONS (IMPORTS) :		
Fils de coton (cotton yarns) .. .. .	26,475	24,973
Tissus de coton (cotton cloth) .. .. .	12,877	16,850
II—EXPORTATIONS (EXPORTS) :		
Fils de coton : exportations totales .. .. .	304,767	236,126
(Cotton yarn : total exports)		
PRINCIPAUX PAYS DE DESTINATION : (Principal countries of destination) :		
Algérie, Colonies françaises et pays de protectorat (Algeria and French Colonies) .. .. .	11,711	13,048
Allemagne (Germany) .. .. .	149,358	103,872
Union Economique Belgo-Luxembourgeoise (Belgium and Luxembourg) .. .. .	42,915	32,285
Pays-Bas (Holland) .. .. .	44,386	25,097
Suisse (Switzerland) .. .. .	15,742	17,319
Pologne (Poland) .. .. .	4,062	5,073
République Argentine .. .. .	7,068	6,104
Tissus de coton : exportations totales (Cotton cloth : total exports) .. .. .	784,191	732,039

PRINCIPAUX PAYS DE DESTINATION (Principal countries of destination)	(Année entière) Quintaux Métriques.	
	1927	1928
Algérie, Colonies françaises et pays de protectorat ..	381,760	361,542
Allemagne .. .. .	129,179	76,915
Angleterre (Great Britain) .. .. .	40,387	37,296
Suisse .. .. .	44,426	55,866
Union Economique Belgo-Luxembourgeoise ..	37,046	38,688
République Argentine .. .. .	20,052	21,723
Etats-Unis (U S A) .. .. .	23,256	19,523
Pays-Bas .. .. .	6,572	8,234
Grèce (Greece) .. .. .	6,408	6,371

(Syndicat Général de l'Industrie Colonnière Française)

## GERMANY.

### SPINNING SECTION.

In all the branches of the German cotton-spinning industry exceedingly bad business conditions have also prevailed during the first three months of the year 1929. In a great many factories the working hours have been further reduced, so that the rate of production, on an average, for the first quarter of 1929, amounts to about 70 to 75 per cent. of the full rate; in many places the amount of curtailment has already reached 30 to 40 per cent. of the full working capacity. In spite of the temporary rise in cotton prices, quotations for yarns did not undergo a corresponding increase, this being due to the constant excess of offers for yarns; consequently the spinning output has dropped furthermore, and the prices are an additional source of losses. Many factories have already brought forward proposals for temporary restrictions, so that a considerable number of lock-outs are expected during the next few months.

Regarding the German export trade in cotton yarns during the month of December, 1928, including February, 1929, the following statement based on official figures can be made:—

1928			Import	Export
December	...	...	30,091*	7,783*
1929				
January	...	...	36,216*	7,977*
February	...	...	28,344*	6,483*

(\* In doppelt-Zentner = 100 kilos.)

*The following is the original report in German:—*

In allen Zweigen der deutschen Baumwollspinnerei hat die überaus schlechte Geschäftslage auch während der ersten 3 Monate des Jahres 1929 angehalten. Die Arbeitszeit ist bei einer grossen Anzahl von Betrieben noch weiter eingeschränkt worden, sodass der Beschäftigungsgrad im Durchschnitt des ersten Vierteljahres 1929 etwa 70-75% der Vollproduktion ausmacht; in vielen Betrieben und Bezirken hat das Mass der Einschränkung bereits 30-40% Vollbeschäftigung erreicht. Trotz der zeitweilig anziehenden Baumwollpreise haben die Garnpreise infolge des dauernden Ueberangebotes an Garnen eine entsprechende Erhöhung nicht erfahren können; die Spinnmarge ist somit noch

weiter gesunken und die Preise sind noch verlustbringender geworden. Eine Reihe von Betrieben hat bereits Stilllegungsanträge gestellt, sodass für die nächsten Monate mit grosseren Arbeiterentlassungen zu rechnen sein wird.

Ueber den deutschen Aussenhandel in Baumwollgarnen während der Monate Dezember 1928 bis einschl. Februar 1929, gibt die nachfolgende Aufstellung, die auf amtlichen Ziffern beruht, Auskunft:—

		Einfuhr dz.	Ausfuhr dz.
1928			
Dezember	... ..	30,091	7,783
1929			
Januar	.. ..	36,216	7,977
Februar	... ..	28,344	6,483

(*Arbeitsausschuss der Deutschen Baumwoll-Spinner-  
verbände, Berlin.*)

### WEAVING SECTION.

The rate of production in the South-German cotton-weaving industry, which was about 80 per cent. of the full production, has proved too high during the last three months; as the sales remained still below the rate of production, the prices were still further depressed owing to the existing stocks left from former times. Subsequently these prices proved utterly inadequate both for coarse fabrics as well as for medium and fine cloths.

During the last few weeks business has somewhat improved and weaving mills could book orders for about one to two months at the present rate of production. The prices obtained are still uneconomical. The reason for these prices being unsatisfactory is due to the fact that to-day, when cotton is quoted about 20 cents. in New York, we do not secure better prices for cloth than at the time when cotton was quoted 14 cents. These continual heavy losses have again brought to the fore proposals for an organized and general restriction in the German cotton-spinning and raw and bleached goods industries. Unfortunately, up to the present, this proposal has not matured, as it did not command sufficient support.

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*The following is the original in German:—*

Der Beschäftigungsgrad der süddeutschen Baumwollweberei während der letzten 3 Monate mit ca. 80% der Vollproduktion erwies sich als noch zu gross, indem die Verkäufe hinter dieser Produktion noch zurückblieben, was angesichts der noch vorhandenen grossen Lagervorräte aus früheren Zeiten auf die Verkaufspreise drückte. Dieselben waren auch weiterhin gänzlich ungenügend und zwar sowohl für grobe Gewebe, als auch für mittlere und feine.

In den letzten Wochen hat sich das Geschäft etwas belebt und haben die Webereien Aufträge buchen können für ungefähr 1 bis 2 Monate bei jetzigem Beschäftigungsumfange. Die erzielten Preise sind immer noch Verlustpreise. Wie schlecht diese Preise sind, geht am besten daraus hervor, dass wir heute bei einem

Baumwollstand von circa 20 cents New York keine besseren Tücherpreise erzielen als zurzeit, da Baumwolle 14 cents notierte. Diese fortgesetzten grossen Verluste haben wiederholt die Absicht, eine organisierte gemeinsame Einschränkung in der deutschen Baumwollspinnerei und Roh- und Weiss-Weberei durchzuführen, zur Diskussion gestellt. — Leider ist diese Absicht bisher immer an ungenügender Beteiligung gescheitert.

(*Verein Süddeutscher Baumwoll-Industrieller, Augsburg.*)

## HOLLAND.

Conditions in the spinning trade have not been satisfactory. The demand from the manufacturers has not been very brisk, and cheap offers of foreign yarns, chiefly from Germany and Belgium, have spoilt the market. The local spinners have been forced to sell at these unremunerative prices, and most of them are complaining about the margins they are able to obtain.

The imports of cotton yarns in this country during 1928 amounted to 32,435 metric tons, at a value of Fl.46,631,000, against 34,504 metric tons, at a value of Fl.45,477,000 in 1927.

Of this quantity 18,263 metric tons were imported from England; 6,554 metric tons from Germany; 4,197 metric tons from Belgium; and 2,624 metric tons from France.

In the manufacturing part of the industry conditions have somewhat improved during the last few months. The demand for the home trade is better than it has been, and stocks do not seem to be large. The export demand is also better, although many manufacturers complain about the prices they have to accept. In some classes of fancy goods manufacturers are very well engaged, and altogether there are a few looms stopped.

The exports of cotton goods, including cotton blankets, during 1928 have amounted to 39,092 metric tons, at a value of Fl.112,640,000, against 37,515 metric tons, at a value of Fl.104,353,000 in 1927.

Of these cotton goods the exports amounted to:—

	Tons	Value
Dutch East Indies ...	16,858	Fl.55,102,000
Africa ... ..	3,536	„ 14,368,000
India .. .. .	1,995	„ 7,145,000
Argentine ... ..	864	„ 2,382,000

## HUNGARY.

### STATISTICAL DATA OF THE EXPORT TRADE OF COTTON ARTICLES

In 1928 are as follows:—

Import in q. (German) hundredweights:—

	1927	1928
Raw cotton ... ..	76,069	90,907
Cotton yarns ... ..	90,085	63,177
Raw cotton cloths ...	60,635	48,780
Bleached cotton cloths ..	13,220	10,919
Dyed cotton cloths ...	2,949	2,956
Printed cotton cloths ...	5,300	5,300
Multi-coloured fabrics ...	21,167	16,343

Export in (German) hundredweights :—

	1927	1928
Cotton yarns ... ..	1,432	4,037
Raw cotton cloths ... ..	1,465	1,404
Bleached cotton cloths .	1,063	408
Dyed cotton cloths ... ..	633	734
Printed cotton cloths .. ..	7,024	10,750
Multi-coloured fabrics ...	470	57

As the above figures will show, the consumption of raw cotton has increased in 1928, and cotton-spinning concerns could develop their trade whilst imports of cotton yarns decreased, due to cotton-weaving mills being compelled to reduce their production. The present situation is, on the whole, unchanged. During the last quarter three new cotton mills have sprung into existence, and after they have been fitted up they will represent an increase of 80,000 in the number of spindles.

*The following is the original German text:—*

DIE STATISTISCHEN DATEN UEBER DEN AUSSENHANDEL  
VON BAUMWOLLARTIKELN IM JAHRE 1928. LAUTEN  
WIE FOLGT —

Einfuhr in q. :—

	1927	1928
Rohbaumwolle .. .	76,069	90,907
Baumwollgarne . . .	90,085	63,177
Rohe Baumwollgewebe ...	60,635	48,780
Gebleichte Baumwollgewebe	13,220	10,919
Gefärbte Baumwollgewebe ...	2,949	2,956
Bedruckte Baumwollgewebe	5,300	5,300
Buntgewebe Baumwollgewebe	21,167	16,343

Ausfuhr in q. :—

	1927	1928
Baumwollgarne ... ..	1,432	4,037
Rohe Baumwollgewebe ...	1,465	1,404
Gebleichte Baumwollgewebe	1,063	408
Gefärbte Baumwollgewebe ...	633	734
Bedruckte Baumwollgewebe...	7,024	10,750
Buntgewebe Baumwollgewebe	470	57

Wie ersichtlich, hat die Aufarbeitung von Rohbaumwolle im Laufe des Jahres 1928 zugenommen, d.h. die Spinnereien haben ihren Betrieb erweitern können, während die Einfuhr von Baumwollgarnen zurückgegangen ist, da die Baumwollwebereien ihre Produktion reduzieren mussten. Die gegenwärtige Lage ist im Allgemeinen unverändert. In den letzten Monaten haben 3 neue Baumwollspinnereien den Betrieb aufgenommen, und nach vollem Ausbau ihrer Einrichtung werden diese neue Fabriken einen Zuwachs der Spindelanzahl um 80,000 repräsentieren.

*(Magyar Textilgyárosok Országos Egyesülete.)*

## ITALY.

During the whole of the year 1928 the Italian cotton industry maintained high production, with some sacrifice, with the object of meeting the new and the future requirements of the world market.

This state of production has been maintained during the first three months of 1929. There was a slight temporary decrease in production in one or two districts, due to the influenza epidemic. Activity in the spinning mills has maintained itself over 92 per cent., in the weaving mills over 86 per cent. The quantities of yarn booked have advanced from Kg.7,976 to Kg.7,993 per spindle, and the remaining quantity from Kg.2,202 to Kg.2,169; in 1928, during the same period, the quantities booked were Kg.6,635, and the remaining Kg.2,266. The weaving mills are all booked up for three months, and only the usual quantity is left in stock.

Sales in the home market have improved; the exports which in 1928 amounted to 84,118 tons, being an increase of 10,000 tons as compared with 1927, have reached almost the level of 1925 (85,150 tons).

The greatest difficulty for our trade is found in the sale prices, which limit the margin of profit to a minimum, compelling a reduction of the cost prices, whilst at the same time improving the quality of the cloth

*(Associazione Italiana Fascista degli Industriali Cotonieri.)*

## SPAIN.

After a very long period (lasting the whole of 1928) of generally quiet and even poor trade in the textile industry, due principally to the latent and old crisis of overproduction, a beginning has at last been noticed in the first quarter of this year in the opposite direction. It is not yet possible to say anything definite about the duration or the importance of the improvement.

There are several causes which have contributed to this change: the condition of the country generally is good, due to the continuity of peace and work; the harvest in 1928 was a good one, on the whole; the enormous and unproductive waste of money in the Morocco War has at last ceased. All these factors have helped to increase slowly the purchasing power of the country.

This small increase in the consuming power has been stimulated by the increase in the price of cotton which took place during the first quarter of this year; it is a well-known fact that buyers abstain whilst the prices fall and are more inclined to do business when the prices rise.

Thus fact, coupled with the influence of the work of the official committee for the control of the textile industry, whose measures have made it possible to export a small amount (experts in the market are of opinion that by doubling the present exports a certain equilibrium, not existing now, would be established between production and consumption), has enabled the home market to work with a reduced quantity of goods and with a better demand.

As a consequence of all these factors, one can say that the production of those articles having the greatest consumption has remained stable, neither increasing nor decreasing. On the other hand, goods of greater perfection and novelties are more in demand than usually, and their market is increasing. It is characteristic of the present state of the textile industry that there is a general tendency to renew machinery and accessories with a view to

perfecting manufacture, and to decrease the cost of production by adopting the latest methods of manufacture.

These, in rough outline, are the interesting features of the present condition of the textile industry.

## U.S.A.

The monthly statement of the production of cotton cloth in U.S.A. during the month of March, issued by the Association of Cotton Textile Merchants and the Cotton Textile Institute, New York, is as follows:—

### PRODUCTION STATISTICS, MARCH, 1929.

The following statistics for the month of March, 1929, cover upwards of 300 classifications or constructions of standard cotton cloths, and represent a very large part of the total production of these fabrics in the United States. This report represents all of the yardage reported to our Association and the Cotton Textile Institute, Inc. It is a consolidation of the same 23 groups covered by our reports since October, 1927. The figures cover a period of four weeks.

					March, 1929 (4 weeks).
Production was	..	..	...	...	297,994,000 yards
Sales were	...	...	...	...	358,333,000 yards
Ratio of sales to production	..	...	...	..	120·2%
Shipments were	..	..	...	...	325,633,000 yards
Ratio of shipments to production	...	...	...	...	109·3%
Stocks on hand March 1 were	...	...	...	...	372,950,000 yards
Stocks on hand March 31 were	...	...	...	...	345,311,000 yards
Change in stocks (Decrease)	...	...	...	...	7·4%
Unfilled orders March 1 were	...	...	...	...	472,176,000 yards
Unfilled orders March 31 were	...	...	...	...	504,876,000 yards
Change in unfilled orders (Increase)	...	...	...	...	6·9%

*(The Association of Cotton Textile Merchants of New York.)*

## AUTOMATIC LOOM ENQUIRY.

The tabulation of the enquiry on automatic looms is not yet complete, and forms are still being received at the offices of the International Cotton Federation.

We are very gratified at the large number of replies which have been received from all over the world. We can assure those who have replied to our enquiry that the final tabulation will contain most interesting and valuable information on automatic looms.

May we ask those who intend to send in their returns to do so at their early convenience, as we hope to forward the complete tabulation to those who have replied to the enquiry early in June.

If a duplicate enquiry form is required, please apply for one to the Head Office, 238, Royal Exchange, Manchester.

# PANEL OF ARBITRATORS

OF THE

*International Federation of Master Cotton Spinners'  
and Manufacturers' Associations, Manchester.*

We publish below a revised list of the Panel of Arbitrators who have been appointed to serve as arbitrators by the Master Cotton Spinners' or Manufacturers' Associations of the countries enumerated.

Members are reminded of the advisability of inserting the following clause in all contracts with foreign countries :

" All disputes and differences under this Contract shall be referred to Arbitration under the Rules for the time being of the International Federation of Master Cotton Spinners' and Manufacturers' Associations relating to Arbitration, which shall be deemed to be incorporated in and to form part of this Contract."

Copies of the Rules of Arbitration, in English, French and German, may be obtained, free, on application to the Head Office, 238, Royal Exchange, Manchester.

## AUSTRIA.

CARL COMPLOJ, Messrs. Getzner & Co., Neutorg 11, Vienna.  
DR. PAUL MONATH, A.G. der Baumwollspinnerei zu Theresienthal  
& Münchendorf, Untere Donaustrasse 13, Vienna II.  
CARL POLLACK, Manager of A. Rudolph, Essling 7, Vienna.

## BELGIUM.

R. BRASSEUR, Spinner.  
R. BOONEN, Spinner.  
A. DOPCHIE, Spinner.  
G. VAN ACKER, Spinner and Weaver.  
G. VOORTMAN, Spinner and Weaver.

## CZECHO-SLOVAKIA.

WALTER BRASS, Wilhelm Brass & Söhne, Hohenstadt  
PAUL SCHICK, M. Schick & Co., Prague and Oberleutensdorf.  
ARWED GROHMANN, Gebr. Grohmann, Wisterschan.  
JOSEPH BARTON, Jr., Manufacturer at Nachod.  
Ing. PAUL MAHLER, Manufacturer at Prague—VII.  
EMIL HERNYCH, Manufacturer at Usti, near Orlicí.  
HUGO STRAUSS, Manufacturer at Honice.

JOSEF GAHLER, Reichenberg.	} Spinners
EMIL SIMON, Reichenberg.	
OTTO GOLTZ, Reichenberg.	
KARL SPIEGEL, Warnsdorf.	} Weavers
ING. WILLY WEBER, Schluckenau.	

DENMARK.

KONSUL GORM BREMMER, A/S De forenede Textil-fabrikker, Aalborg.	} Spinners
DIRECTOR G. HEPWORTH, A/S De danske Bomulds-spinderier, Vejle.	
PROKURIST H. KREIBERG, A S Windfeld-Hansens Bomuldsspinderi, Vejle.	
DIREKTOR P. JACOBSEN, A/S Wessel & Vett's Fabrikken Landskronagade 70, Copenhagen	} Weavers
FABRIKANT CHR. MADSEN, Osterbros Dampvæveri, Oresundsgade 6, Copenhagen.	
FABRIKANT POUL NEUBERT, A/S de danske Bomulds-væverier, Viborggade 78, Copenhagen.	

ENGLAND.

*Representatives of the English Federation of Master Cotton Spinners' Associations:*

FREDERICK HOLROYD, J.P., Springwood Mills, Holywell Green, Halifax, Yorks  
 F. MILLS, Hopkin Mills, Lees, Oldham.  
 H. W. LEE, Fine Cotton Spinners' & Doublers' Association, Ltd., 6, St. James's Square, Manchester.  
 R. H. JACKSON, J.P., Hoyle & Jackson, Ltd., Oldham.  
 ROBERT WORSWICK, Hall Carr Mill, Rawtenstall.  
 W. HEAPS, Shaw, Jardine & Co., Ltd., Butler Street, Manchester.  
 JESSE THORPE, New Pearl Mill, Ltd., Glodwick, near Oldham.  
 A. E. BELL, Brunswick Spinning Co., Ltd., Mossley, Lancs.  
 WILLIAM HOWARTH, Temple Chambers, 6, St. James's Square, Manchester.  
 H. ROBERTS, Victor Mill, Ltd., Stalybridge.  
 Col. N. S. BROWN, Amalgamated Cotton Mills' Trust, Stanley Street, Preston.

*Representatives of the Lancashire Cotton Spinners' and Manufacturers' Association:*

H. ASTLEY-BELL, Messrs. J. & A. Leigh, Ltd., Brookhouse Mill, Preston.  
 W. T. BOOTHMAN, Messrs. J. Kershaw & Co., Ltd., Derby Street Mill, Bolton.  
 J. W. DYSON, The Brierfield Mills, Ltd., Brierfield, near Burnley.  
 WALTER MATHER, Messrs. Mather Bros., Ltd., Scholefield Mill, Nelson.  
 JAMES SMITH, Messrs. Lewis Bros., Ltd., Springfield Mill, Blackburn.

FINLAND.

Baron K. E. PALMÉN, Chairman, Finnish Cotton Association, Boulevardsgatan 30, Helsingfors.  
 ERKKI REIJONEN, Repslagaregatan 7B, Helsingfors.  
 EMIL J. SIMOLA, Professor of Textile Technology, Technical Academy, Ahlqvistgatan, 4A, Helsingfors.

## FRANCE.

PAUL MULLIEZ, 120 bis, Rue de l'Ommelet, Roubaix.	} Spinners
EUG. LAVOISIER, Saint-Léger-du-Bourg-Denis (Seine-Intérieure).	
P. MANGIN, 12 bis, Avenue Bosquet, Paris.	
H. MANUEL, 33, rue Poissonnière, Paris.	
ANDRE WALLAERT, 17, Place de Tourcoing, Lille	} Weavers
ALLÈGRE, rue Saint-Lou, Amiens.	
ERNEST BOIGEOL, Giromagny, Territoire de Belfort.	
R. SEYRIG, Etabs. George Koechlin, Belfort.	
PAUL SCHLUMBERGER, Maison Schlumberger & Cie., Mulhouse, Alsace.	

## GERMANY.

JOH. EISTER, Messrs. Gebr. Uebel, Adorf, Vogtland.	} Spinners
H. ANHEGGER, Director of the Chemnitzer Actien-Spinnerei, Chemnitz.	
KOMMERZIENRAT MOSER, Managing-Director of the Baumwoll-Spinnerei am Stadtbach, Augsburg.	
GEH. KOMMERZIENRAT OTTO LINDENMEYER, Managing-Director of the Mech. Baumwoll-spinnerei and Weberei Augsburg, Augsburg.	} Spinners and Weavers
DIREKTOR EMIL WAIBEL, Managing-Director of the Süddeutsche Baumwollindustrie Kuchen, Post Gingen a. F.	
DIREKTOR WILHELM BAUER, Managing-Director of the Spinnerei und Weberei Offenburg, Offenburg.	
DIREKTOR WILHELM KLEINECKE, Managing-Director of the Neue Baumwollspinnerei and Weberei Hof, Hof i. Bayern.	
GEHEIMER KOMMERZIENRAT AUGUST FROMMEL, Messrs. Wilh. Butz & Söhne, Augsburg.	} Weaver

## HOLLAND.

A. H. LEDEBOER, Van Heek & Co., Enschede.
Sig. MENKO N. Jzn., N. J. Menko, Enschede.
D. W. de MONCHY, Nederlandsche Katoenspinnerij, Hengelo.
B. SCHOLTEN Jzn., Gebr. Scholten & Co., Almelo.

## HUNGARY.

ROBERT VON SZURDAY, Vice-President of the Hungarian Textile Association, Manager of the cotton-spinning firm of Magyar Pamutipar.
DR. LEO VON BUDAY-GOLDBERGER, Vice-President of the Hungarian Textile Association, Manager of Goldberger Sám f. és Fiai.
SIGFRID KAMMER, President of the weaving section of the Hungarian Textile Association, Manager of Kammer Testvérek.

# ITALY.

Prof. PAULO ALBERZONI, Milan.  
 Gr. Uff. Dr. GIORGIO MYLIUS, Milan.  
 Gr. Uff. PIETRO SOLDINI, Milan.  
 Gr. Uff. Ing. CARLO TARLARINI, Milan.  
 Gr. Uff. VITTORIO OLCESE, Milan.  
 Dr. CARLO CANESI, Monza.  
 Dr. Rag. Gr. Uff. Cav. CANTO, Lav. Bruno-Napoli.  
 Comm. Dr. ARMINIO BRUNNER, Trieste.  
 ERNESTO NIGGELER, Palazzolo sull'Oglio (Brescia).  
 Ing. FRANCESCO CESONI, Vigevano (Pavia).  
 Dr. Comm. BENIGNO CRESPI, Milan.  
 Cav. Rag. ALESSANDRO FRESCHI, Mathi Canavese (Torino).  
 Rag. Comm. BIAGIO MARIANO, Torino.  
 ATTILIO VERCELLI, Milan.  
 Dr. GIOVANNI RASINI, Milan.  
 Cav. RICCARDO LEGLER, Ponte S. Pietro (Bergamo).  
 Cav. ERARDO BELLAVITA, Milan.  
 LUIGI BELLAVITA, Milan.

# NORWAY.

EDUARDO BLIKSTAD, Nydalens Compagnie, Oslo.  
 OSCAR JEBSEN, Nye Høie Fabrikker A/S, Kristianssand S.  
 NIK. YOUNG, Halvor Schou, Oslo.

# SPAIN.

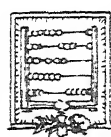
RAMÓN BACH,	} Barcelona.
CELESTINO GALCERAN,	
ANTONIO FELIU,	
LUÍS A. SEDÓ,	
LUIS ESCAYOLA.	

# SWEDEN.

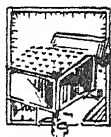
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 C. J. BERGH, Manufaktur A.B., i. Malmö, Malmö.  
 CLAS ERIKSON, Rydboholms A.B., Rydboholm.  
 KNUT MARK, Gamlestadens Fabrikers A.B., Göteborg.  
 NILS MÖLLER, Claes Johansson & Co. A.B., Gothenburg.

# SWITZERLAND.

EDUARD BEBIÉ, Turgi.  
 VICTOR BÜHLER, Hermann & Co., Winterthur.  
 AUGUST HENGGLER, St. Niklausen, near Lucerne.  
 E. v. HEGNER-MEYER, Spinnerei and Weberei Zurich A.-G., Zurich.  
 F. FORSTER-GANZ, Bülach.  
 A. HALTER, Weberei Grüneck, Müllheim.  
 HCH. SPÖRRY, Spörry & Schaufelberger, Wald.  
 D. JENNY-SQUEDER, Ennenda.  
 DIREKTOR J. HUBER, Wallenstadt.  
 HANS JAEGGLI-CORTI, Winterthur.  
 H. WENGLE-JENNY, Uster.



# INTERNATIONAL COTTON STATISTICS



Since the publication of the preliminary result of the Census of the Consumption of Cotton and Mill Stocks of the World's Cotton Mills for the half-year ended 31st January, 1929, we have received a communication from the Russian Central Cotton Committee to the effect that the weight of the Russian bale has been changed to 163.8 kg. The Committee also point out that the Persian bale weighs 114.7 kg. The figures for Russia were cabled to us in metric tons and converted to bales of 400 lbs. weight. We have consequently reconverted the consumption and stocks Sundries figures for Russia to running bales of the new weight. This makes a slight alteration in the world's total quantity of sundries cotton consumed and in stock. The Central Cotton Committee has also modified the number of mule and ring spindles and gives the spindles in course of erection as 410,000.

The total world's cotton-mill consumption for the half-year ended January 31, 1929, compared with the same period of the previous year, is as follows:—

	31st Jan 1929 bales	31st Jan 1928 bales	Increase or Decrease bales
American Cotton ..	7,613,000	8,226,000	— 613,000
East Indian Cotton ..	2,574,000	2,303,000	+ 271,000
Egyptian Cotton ..	497,000	489,000	+ 8,000
Sundries ..	2,184,000	1,969,000	+ 215,000
All kinds of Cotton ..	<u>12,868,000</u>	<u>12,987,000</u>	— 119,000

The total world's cotton-mill stocks on January 31, 1929, were:—

## AMERICAN COTTON:

Europe ..	783,000 bales against	845,000 bales on 31st Jan., 1928.
Asia ..	349,000 " "	331,000 " " " "
America ..	1,802,000 " "	1,678,000 " " " "

The total world's mill stocks of American cotton on January 31, 1929, were 2,958,000 bales, as against 2,867,000 bales and 2,982,000 on the same date in the years 1928 and 1927 respectively; or larger by 91,000 (1928) and smaller by 24,000 (1927)

## EAST INDIAN COTTON:

Europe ..	248,000 bales against	166,000 bales on 31st Jan., 1928.
Asia ..	948,000 " "	789,000 " " " "

Altogether the mill stocks of East Indian cotton are 1,216,000 bales against 969,000 twelve months ago; 247,000 bales more.

## EGYPTIAN COTTON.

Europe ..	136,000 bales <i>against</i>	116,000 bales on 31st Jan., 1928.
Asia ..	10,000 " "	24,000 " "
America ..	32,000 " "	41,000 " "

The total mill stocks of Egyptian cotton are 182,000 bales against 183,000 bales twelve months ago; 1,000 bales less.

## SUNDY COTTONS

Europe ..	439,000 bales <i>against</i>	412,000 bales on 31st Jan., 1928.
Asia ..	307,000 " "	275,000 " "
America ..	122,000 " "	138,000 " "

The total world's mill stocks of all kinds of cotton on January 31, 1929, were 5,294,000 bales against 4,882,000 bales on January 31, 1928, and 4,755,000 bales on January 31, 1927; i.e., more by 412,000 and more by 539,000 bales respectively.

NORMAN S. PEARSE,

*Assistant to the General Secretary.*

## SHORT-TIME TABLE.

NUMBER OF WEEKS OF 48 HOURS DURING WHICH THE TOTAL NUMBER OF SPINDLES FROM WHICH RETURNS HAVE BEEN RECEIVED WERE STOPPED.

					Half-year ending	
					Jan. 31, 1929	July 31, 1928
England ..	.	.	.	.	4.393	4.805*
Germany ..	.	.	.	.	1.976	1.710
France ..	.	.	.	.	0.897	1.184
Italy ..	.	.	.	.	3.616	1.923
Czecho-Slovakia ..	.	.	.	.	—	—
Belgium ..	.	.	.	.	0.750	0.763
Spain ..	.	.	.	.	7.799	6.499
Poland ..	.	.	.	.	Overtime	1.456
Switzerland ..	.	.	.	.	1.495	1.094
Holland ..	.	.	.	.	0.008	0.052
Austria ..	.	.	.	.	7.220	8.625
Sweden ..	.	.	.	.	1.273	0.593
Portugal ..	.	.	.	.	0.072	0.204
Finland ..	.	.	.	.	0.589	Nil
Denmark ..	.	.	.	.	1.612	1.274
Norway ..	.	.	.	.	5.304	4.390
Japan ..	.	.	.	.	12.072†	11.695†
Canada ..	.	.	.	.	3.476	3.958
Mexico ..	.	.	.	.	3.156	1.435
China ..	.	.	.	.	9.982‡	13.375‡
Brazil ..	.	.	.	.	4.027	2.292

U.S.A. spindles operating in January, 30,758,000 out of a total of 35,335,000.

\* The stoppage of the whole of the American Spinning Section amounted to 6.523 (7.355) weeks, and the Egyptian Section to 1.323 (1.269) weeks. There were 76 (54) mills with 3,931,401 (2,790,648) spindles in the American Section completely stopped during the last six months.

† This figure represents working weeks of 48 hours. The general working week in Japan was 132 hours, until May of 1923, when it was altered to a 120-hour week. Calculated in Japanese working weeks the stoppage is equal to 4.828 (4.678) weeks for the last six months under review.

‡ The working week in China is 132 hours. Calculated in Chinese working weeks the stoppage is equal to 3.630 (5.350) weeks for the last six months under review.

(Figures in *Italics* refer to previous six months.)

Calculated TOTAL WORLD'S COTTON MILL CON-  
with previous figures for comparison, on basis of Spinners'

COUNTRIES		IN THOUSANDS OF ACTUAL BALES (regardless of weight)							
		AMERICAN				EAST INDIAN			
		Half-year ending				Half-year ending			
		Jan. 31 1929	July 31 1928	Jan. 31 1928	July 31 1927	Jan. 31 1929	July 31 1928	Jan. 31 1928	Jan. 31 1927
EUROPE :—									
(1)	Great Britain ..	971	922	1,027	940	92	74	47	48
(2)	Germany ..	550	509	677	565	122	117	95	94
(3)	France ..	419	422	407	419	105	102	78	91
(4)	Russia ..	317	117	376	267	—	—	—	—
(5)	Italy ..	372	365	342	342	111	98	81	106
(6)	Czecho-Slovakia	198	197	237	172	41	39	39	32
(7)	Belgium ..	129	102	113	140	90	83	64	27
(8)	Spain ..	158	163	151	91	37	30	34	75
(9)	Poland ..	123	145	173	28	14	12	12	3
(10)	Switzerland ..	27	29	28	146	4	4	3	19
(11)	Holland ..	76	73	74	47	18	18	16	12
(12)	Austria ..	52	58	64	62	21	16	18	15
(13)	Sweden ..	49	53	52	46	1	1	—	1
(14)	Portugal ..	21	22	34	29	1	—	2	—
(15)	Finland ..	18	20	21	20	—	—	—	—
(16)	Denmark ..	10	10	11	10	—	—	—	—
(17)	Norway ..	3	4	4	3	—	—	—	—
Europe Total ..		3,480	3,301	3,791	3,327	657	594	489	523
ASIA :									
(1)	India ..	27	21	117	60	922	840	1,000	1,170
(2)	Japan ..	522	506	572	513	737	565	676	840
(3)	China ..	121	146	151	113	218	200	108	258
Asia Total ..		670	673	840	686	1,877	1,605	1,784	2,268
AMERICA :									
(1)	U.S.A. ..	3,305	3,070	3,465	3,286	10	12	15	13
(2)	Canada ..	103	101	94	87	—	—	—	—
(3)	Mexico ..	—	—	—	—	—	—	—	—
(4)	Brazil ..	—	—	—	—	—	—	—	—
America Total ..		3,408	3,171	3,559	3,373	10	12	15	13
Sundries ..		55	36	36	37	30	9	15	14
HALF-YEAR'S TOTAL ..		7,613	7,181	8,226	7,423	2,574	2,220	2,303	2,818

SUMPTION for the Half-year ending 31st Jan., 1929,  
returns made to the International Cotton Federation.

IN THOUSANDS OF ACTUAL BALES (regardless of weight)											
EGYPTIAN				SUNDRIES				TOTAL			
Half-year ending				Half-year ending				Half-year ending			
Jan. 31 1929	July 31 1928	Jan. 31 1928	Jan. 31 1927	Jan. 31 1929	July 31 1928	Jan. 31 1928	Jan. 31 1927	Jan. 31 1929	Jan. 31 1928	July 31 1928	Jan. 31 1927
191	186	172	186	183	201	275	242	1,450	1,388	1,521	1,416
36	29	34	31	16	13	18	12	724	791	824	762
47	46	49	51	42	35	41	64	613	605	575	625
38	34	37	30	705	834	466	524	1,058	985	879	827
25	24	24	25	10	12	8	11	518	499	455	484
12	12	16	10	2	4	2	3	251	252	291	217
2	2	2	11	33	37	21	12	235	224	200	190
12	10	11	2	6	5	9	11	211	208	205	179
8	3	7	21	1	5	3	—	146	165	195	52
21	24	24	6	1	1	3	3	53	58	58	174
—	—	—	1	—	1	1	4	94	92	91	64
2	2	2	—	1	3	1	2	76	79	85	79
—	—	—	—	1	1	2	—	51	55	55	47
—	1	—	—	10	12	16	13	32	35	52	42
—	—	—	—	—	—	—	—	18	20	21	20
—	—	—	—	—	—	—	—	10	10	11	10
—	—	—	—	—	—	—	—	3	4	4	3
392	373	379	374	1,014	1,167	866	901	5,543	5,435	5,325	5,125
1	1	2	3	29	24	29	29	979	886	1,148	1,262
19	20	19	23	63	128	55	67	1,341	1,219	1,322	1,443
—	—	1	1	605	901	509	628	944	1,247	769	1,000
20	21	22	27	697	1,053	593	724	3,264	3,352	3,239	3,705
75	64	80	74	28	24	30	29	3,418	3,180	3,590	3,402
3	2	1	4	—	—	—	—	106	103	95	91
—	1	—	—	83	86	102	103	83	87	102	103
—	—	—	—	251	257	295	189	251	257	295	189
78	67	81	78	362	377	427	321	3,858	3,627	4,082	3,785
7	6	7	8	111	88	83	55	203	139	141	114
497	467	498	487	2,184	2,685	1,969	2,001	12,868	12,553	12,987	12,729

# Calculated TOTAL WORLD'S COTTON MILL STOCKS comparison on basis of Spinners' returns

IN THOUSANDS OF ACTUAL BALES  
(regardless of weight)

COUNTRIES	AMERICAN				EAST INDIAN			
	Half-year ending				Half-year ending			
	Jan. 31 1929	July 31 1928	Jan. 31 1928	Jan. 31 1927	Jan. 31 1929	July 31 1928	Jan. 31 1928	Jan. 31 1927
EUROPE :								
(1) Great Britain ..	91	79	99	127	16	24	11	13
(2) Germany ..	140	135	185	178	43	48	31	18
(3) France ..	154	144	153	140	60	69	32	35
(4) Russia ..	12	52	16	12	—	—	—	—
(5) Italy ..	148	143	129	135	49	51	33	23
(6) Czecho-Slovakia ..	54	50	61	53	13	13	11	7
(7) Belgium ..	32	43	43	30	38	45	20	3
(8) Spain ..	25	29	32	31	8	8	5	23
(9) Poland ..	24	23	19	24	2	7	3	2
(10) Switzerland ..	20	16	21	24	3	4	2	2
(11) Holland ..	35	29	34	18	9	14	5	4
(12) Austria ..	14	15	16	31	6	6	4	4
(13) Sweden ..	19	21	21	17	1	1	—	—
(14) Portugal ..	5	4	6	13	—	—	—	—
(15) Finland ..	6	5	5	5	—	—	—	—
(16) Denmark ..	3	3	4	2	—	—	—	—
(17) Norway ..	1	1	1	2	—	—	—	—
Europe Total ..	783	792	845	842	248	290	166	134
ASIA :								
(1) India ..	41	63	23	25	667	864	531	436
(2) Japan ..	267	206	260	194	241	426	233	177
(3) China ..	41	58	48	50	40	139	25	70
Asia Total ..	349	327	331	269	948	1,429	789	683
AMERICA :								
(1) U.S.A. ..	1,698	931	1,624	1,789	9	5	6	8
(2) Canada ..	104	53	54	69	—	—	—	—
(3) Mexico ..	—	—	—	—	—	—	—	—
(4) Brazil ..	—	—	—	—	—	—	—	—
America Total ..	1,802	984	1,678	1,858	9	5	6	8
Sundries ..	24	9	13	13	11	4	8	4
HALF-YEAR'S TOTAL ..	2,958	2,112	2,867	2,982	1,216	1,728	969	829

on 1st February, 1929, with previous figures for  
made to the International Cotton Federation

IN THOUSANDS OF ACTUAL BALES  
(regardless of weight)

EGYPTIAN				SUNDRIES				TOTAL			
Half-year ending				Half-year ending				Half-year ending			
Jan. 31 1929	July 31 1928	Jan. 31 1928	Jan. 31 1927	Jan. 31 1929	July 31 1928	Jan. 31 1928	Jan. 31 1927	Jan. 31 1929	July 31 1928	Jan. 31 1928	Jan. 31 1927
46	43	36	41	56	58	69	63	209	204	215	244 (1)
13	13	15	10	6	4	6	3	202	200	237	209 (2)
27	19	18	20	30	22	21	30	271	254	224	225 (3)
7	11	10	10	321	230	287	343	340	293	313	365 (4)
13	9	9	11	5	4	5	5	215	207	176	174 (5)
5	4	4	4	1	1	1	1	73	68	77	65 (6)
2	1	1	5	11	11	13	3	83	100	86	41 (7)
4	4	5	1	2	3	2	5	39	44	44	60 (8)
2	1	1	15	—	1	1	—	28	32	24	41 (9)
16	10	17	3	1	2	2	1	40	32	42	30 (10)
—	—	—	—	—	1	1	1	44	44	40	23 (11)
1	1	—	—	1	1	1	—	22	22	21	35 (12)
—	—	—	—	1	1	1	1	21	23	22	18 (13)
—	—	—	—	4	2	2	5	9	6	8	18 (14)
—	—	—	—	—	—	—	—	6	5	5	5 (15)
—	—	—	—	—	—	—	—	3	3	4	2 (16)
—	—	—	—	—	—	—	—	1	1	1	2 (17)
136	116	116	120	439	340	412	461	1,606	1,538	1,539	1,537
1	2	1	2	14	35	11	10	723	964	566	473 (1)
9	17	23	15	35	46	81	16	552	695	597	402 (2)
—	—	—	—	258	181	183	153	339	378	256	273 (3)
10	19	24	17	307	262	275	179	1,614	2,037	1,418	1,148
30	32	39	32	19	25	21	10	1,756	993	1,690	1,839 (1)
2	1	1	1	—	—	—	—	106	54	55	70 (2)
—	—	1	—	36	45	39	45	36	45	40	45 (3)
—	—	—	—	67	62	78	49	67	62	78	49 (4)
32	33	41	33	122	132	138	104	1,965	1,154	1,863	2,003
4	2	2	3	70	43	38	27	109	58	61	47
132	170	183	173	938	777	863	771	5,294	4,787	4,882	4,755

# **CALCULATED TOTAL WORLD'S COTTON** **years 31st Jan., 1929, and 31st July,** **the International Cotton**

COUNTRIES	TOTAL ESTIMATED NUMBER OF SPINNING SPINDLES		MULE SPINDLES	
	Half-year ended		Half-year ended	
	Jan. 31, 1929	July 31, 1928	Jan. 31, 1929	July 31, 1928
<b>EUROPE :</b>				
Great Britain ..	59,748	57,136	43,310	44,081
Germany .. ..	11,153	11,153	4,630	4,630
France .. .. .	9,785	9,770	3,496	3,615
Russia .. .. .	7,357	7,311	2,332	2,597
Italy .. .. .	5,227	5,189	651	689
Czecho-Slovakia ..	3,661	3,663	1,681	1,709
Belgium .. ..	2,112	2,070	461	457
Spain .. .. .	1,900	1,897	10	10
Poland .. .. .	1,530	1,544	432	493
Switzerland .. ..	1,503	1,525	677	728
Holland .. .. .	1,171	1,111	251	245
Austria .. .. .	1,040	1,014	419	398
Sweden .. .. .	628	619	98	116
Portugal .. .. .	503	593	173	173
Finland .. .. .	259	252	45	46
Denmark .. .. .	90	95	5	5
Norway .. .. .	54	52	13	13
<b>Total .. ..</b>	<b>104,760</b>	<b>104,904</b>	<b>58,708</b>	<b>59,999</b>
<b>ASIA :</b>				
India .. .. .	8,704	8,703	897	949
Japan .. .. .	6,436	6,272	41	42
China .. .. .	3,526	3,504	—	—
<b>Total .. ..</b>	<b>18,666</b>	<b>18,479</b>	<b>938</b>	<b>991</b>
<b>AMERICA :</b>				
U.S.A. .. .. .	35,335	35,542	2,000	2,587
Canada .. .. .	1,181	1,104	208	206
Mexico .. .. .	840	840	—	—
Brazil .. .. .	2,610	2,610	3	3
<b>Total .. ..</b>	<b>39,966</b>	<b>40,146</b>	<b>2,211</b>	<b>2,796</b>
<b>Sundries .. ..</b>	<b>1,703</b>	<b>1,574</b>	<b>382</b>	<b>180</b>
<b>Grand total ..</b>	<b>165,104</b>	<b>165,103</b>	<b>62,239</b>	<b>63,966</b>

SPINNING SPINDLES (000's omitted) for the half-1928, on basis of returns made to Federation's Statistics.

RING SPINDLES		SPINNING SPINDLES EGYPTIAN COTTON		SPINDLES IN COURSE OF ERECTION	
Half-year ended		Half-year ended		Half-year ended	
Jan. 31, 1929	July 31, 1928	Jan. 31, 1929	July 31, 1928	Jan. 31, 1929	July 31, 1928
13,438	13,655	17,929	18,899	77	114
6,525	6,523	1,214	1,166	150	123
6,289	6,155	2,150	1,672	91	71
5,025	4,714	300	300	410	100
4,573	4,500	676	700	158	59
1,980	1,963	462	488	9	15
1,651	1,613	31	31	22	17
1,899	1,887	120	130	—	—
1,107	1,018	232	47	16	54
826	797	829	901	58	20
903	866	—	—	3	33
636	626	47	55	—	4
530	493	19	13	15	10
330	330	10	10	2	—
214	206	10	5	—	13
94	90	—	—	—	—
41	39	—	—	—	—
46,091	44,995	24,020	24,247	1,001	637
7,807	7,754	3	—	58	56
6,395	6,231	170	550	118	200
3,526	3,504	—	—	6	25
17,728	17,488	173	550	182	281
33,335	32,955	2,000	2,000	?	?
973	948	34	20	—	—
840	840	—	5	3	11
2,607	2,607	—	—	12	2
37,755	37,350	2,034	2,025	15	13
1,321	1,394	120	129	87	16
102,865	101,137	26,347	27,051	1,285	947

**SPECIFICATION OF PART OF THE COTTON RETURNED AS "SUNDRIES" (IN ACTUAL BALES)**  
**Six Months ending 31st January, 1929, calculated from Actual Returns**

**CONSUMPTION.**

	Percu	Brazilian	Argentine	West Indian	Mexican	Turkish	Mesopotamian	Sudan	East African	West African	South African	Chinese	Albanian	Others and unsuspended	Total
Great Britain ..	61,008	10,345	20,046	5,379	1,256	765	795	35,711	17,863	6,404	1,162	—	2,122	7,520*	185,986
Germany ..	5,098	128	3,135	1,334	559	728	71	—	1,051	3,123	318	—	29	—	15,948
France ..	1,236	946	2,053	200	—	700	—	3,462	—	9,876	—	—	—	23,107	41,639
Italy ..	186	—	172	—	—	4,482	—	—	132	(1 Somali)	79	—	—	{ Italian 1,813 Others 1,020 }	9,938
Belgium ..	—	—	—	—	—	—	—	—	—	(Congo) 30,883	—	—	—	1,920	32,852
Switzerland ..	488	—	—	—	—	—	—	707	—	—	8	134	—	1,317	1,757
Holland ..	242	—	16	—	—	357	—	—	—	—	—	—	—	757	1,408
Austria ..	440	58	—	—	—	—	—	—	—	—	—	—	—	—	1,441
Czechoslovakia ..	120	555	—	—	—	886	—	—	—	101	—	605,128	—	1,629	2,331
China ..	—	—	—	—	—	351	—	—	121	—	—	—	—	10	605,108
Brazil ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	231,482
Mexico ..	—	251,182	—	—	—	—	—	—	—	—	—	—	—	—	85,028
Sweden ..	136	—	70	—	—	—	—	—	69	255	—	—	—	—	530
Spain ..	—	—	—	—	—	439	—	—	—	—	—	—	—	5,888	6,327
<b>Total ..</b>	<b>72,563</b>	<b>272,514</b>	<b>25,402</b>	<b>6,913</b>	<b>84,869</b>	<b>8,158</b>	<b>866</b>	<b>39,900</b>	<b>19,249</b>	<b>51,796</b>	<b>4,807</b>	<b>605,630</b>	<b>2,451</b>	<b>13,979</b>	<b>1,239,243</b>

**STOCKS.**

Great Britain ..	12,142	7,873	1,479	4,640	89	104	502	19,782	5,989	838	247	—	—	2,649	56,336
Germany ..	2,003	—	1,282	1,092	379	1,320	57	100	135	467	109	311	—	—	5,980
France ..	1,098	763	1,660	—	—	2,547	—	2,226	—	5,420	—	—	—	17,278	26,674
Italy ..	19	—	87	—	—	—	—	—	105	(1. Somali) 421	29	—	—	{ Italian 1,214 Others 382 }	5,583
Belgium ..	—	—	—	—	—	—	—	—	—	(Congo) 11,027	—	—	—	382	11,419
Switzerland ..	32	—	—	—	159	—	—	849	26	—	—	21	—	290	1,356
Holland ..	18	—	21	—	—	88	—	—	—	100	—	—	—	—	148
Austria ..	319	3*	—	—	—	—	—	—	—	—	—	—	—	—	422
Czechoslovakia ..	—	119	—	—	—	626	—	—	—	—	—	—	—	—	745
China ..	—	—	—	—	—	295	—	—	—	—	19	—	—	305	619
Brazil ..	—	69,749	—	—	—	—	—	—	—	—	—	—	—	97	278,110
Mexico ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	69,749
Sweden ..	29*	—	—	—	—	—	—	—	—	—	—	—	—	—	36,155
Spain ..	—	—	119	10	—	—	—	—	29	22	—	—	—	—	464
<b>Total ..</b>	<b>15,924</b>	<b>78,507</b>	<b>4,548</b>	<b>5,742</b>	<b>36,782</b>	<b>5,183</b>	<b>550</b>	<b>22,957</b>	<b>6,284</b>	<b>18,295</b>	<b>404</b>	<b>258,115</b>	<b>56</b>	<b>25,118</b>	<b>478,704</b>

\* Includes Paraguay 201, Columbian 156, etc.

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# COTTON GROWING

## IN NEW COUNTRIES

### ARGENTINE.

Cotton exports from Argentina in 1928 showed a considerable increase over the figures for the previous year, being 92,029 bales as against 49,845. The 1928 cotton exports went to the following countries:—

	bales
United Kingdom .. .. .	49,485
Germany .. .. .	16,288
France and Belgium .. .. .	15,004
Spain .. .. .	8,332
Italy .. .. .	2,910
Chile .. .. .	10

The area cultivated in 1927-1928 was 85,000 hectares, which shows a decline when compared with the 1925-1926 figures of 110,058 hectares. It is, however, expected that for the 1928-1929 season there will be at least 105,000 hectares under cultivation, while the management of the crop and its marketing are now on a much better footing than was the case some years ago.

### BRAZIL.

According to the Minister of Agriculture, Industry and Commerce of Brazil, the production of raw cotton by the various States in Brazil for 1927-28 was as follows:—

State	1925-1926		1926-1927		1927-1928	
	Production of cotton kilos	Area cultivated hectares	Production of cotton kilos	Area cultivated hectares	Production of cotton kilos	Area cultivated hectares
São Paulo ..	33,018,000	125,922	5,385,200	40,339	10,175,400	42,400
Ceará ..	18,558,000	62,498	14,595,000	45,374	24,000,000	62,000
Pernambuco ..	17,883,000	62,121	15,000,000	75,000	18,000,000	80,000
Parahyba ..	17,271,000	60,149	14,230,000	51,744	15,000,000	84,000
Maranhão ..	15,642,000	60,016	10,680,000	41,167	6,290,170	47,176
Rio Grande do Norte ..	15,475,000	54,819	13,765,000	39,470	12,000,000	58,000
Alagoas ..	6,916,000	33,375	6,320,000	25,436	7,300,000	23,133
Minas Geraes ..	6,954,000	29,666	3,154,500	14,020	3,650,160	23,236
Piauí ..	4,538,000	22,483	3,550,000	21,038	800,000	5,000
Bahia ..	4,340,000	19,750	3,180,000	9,566	3,000,000	20,000
Sergipe ..	3,774,000	32,116	4,843,380	24,418	3,975,000	29,997
Pará ..	1,854,000	8,456	783,340	3,900	1,066,000	8,658
Amazonas ..	412,000	2,050	84,000	1,015	100,000	1,015
Paraná ..	341,000	1,740	312,000	1,270	—	—
Goyaz ..	311,000	1,855	241,000	1,251	250,000	1,500
Espírito Santo ..	207,000	1,292	245,000	900	240,000	900
Rio de Janeiro ..	183,000	1,236	682,500	2,100	504,200	2,521
Outros Estados ..	200,000	383	225,500	1,134	250,000	1,230
Total ..	147,920,000	579,927	97,276,420	399,143	106,600,930	490,766

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FRENCH MOROCCO.

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A ginning station has just been built at Casablanca with a view to dealing with the greater part of the producers' crop. The fibre obtained from Moroccan cotton is reported to be much appreciated by experts, the variety generally used by farmers being one of the "Pima" family. With a view to extending the cultivation of cotton still more in French Morocco—where, especially in the Northern districts, large areas are already devoted to it—the Associated Cotonnière Coloniale has established a cotton credits scheme to help farmers, both European and native, to finance the crop.—(*The Commercial.*)

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IRAQ.

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Sir William Himbury, Managing Director of the British Cotton Growing Association, in his preliminary report on his recent visit to Iraq, states that the production of American long-staple cotton (grown from Webber seed, and now known as "Mesowhite") in Iraq, during the past eight years, ranged from 60 bales in 1921 to 3,500 in 1926. In 1927 there was a falling-off to 1,800 bales, but in 1928 it had reached 5,400 bales. The temporary setback in 1927 was due principally to the low prices that prevailed towards the end of 1926.

Planting is usually done before the middle of March, although the tendency in recent years has been for farmers to delay their applications for seed until they are actually ready to plant. It was very encouraging to find that by the end of January many farmers had registered their requirements, and everything points to 1929 providing a fresh record.

A remarkable increase in the number of pumping installations is noticeable, and over 90 per cent. of the cotton crop is produced on estates irrigated by this method. Approximately 200 engines were erected in 1928, bringing the total capacity employed on irrigation to over 40,000 h.p.

There is no doubt that a wave of enthusiasm for the cultivation of cash crops, or crops for export (and especially cotton) is going through the country. One Member of Parliament informed Sir William that he had reaped 42 tons of seed cotton from 35 acres of land, which worked out at over 600 lbs. of lint per acre, and there are many other important growers who have done almost as well. His Majesty King Faissal is one of the keenest of growers. He has three or four farms, one near the Palace being named "Wazirizah," which is 4,000 acres in extent. Last season His Majesty had 400 acres under cotton on this estate, from which he obtained 1,600 lbs. of seed cotton (or 400 lbs. of lint) per acre.

## MEXICO.

The estimated yield of cotton in the Mexicali district is put at 70,000 bales, according to the local brokers. While no official estimates are as yet available, it is said that next year's plantings in 1929 will again be large.

## SUDAN.

The revised estimate of cotton production for 1928-1929 in the Sudan, issued by the Sudan Government in February, is as follows:—

							Kantars of 315 rottles seed cotton	
							1928-29	1927-28
Sakel :								
Gezira	..	..	..	..	..	..	450,728	348,000
Tokar	..	..	..	..	..	..	63,492	53,000
Kassala	..	..	..	..	..	..	63,000	66,000
Shambat and Kamlin	..	..	..	..	..	..	1,650	—
Private Estates (Berber and Khartoum Province)	..	..	..	..	..	..	5,700	5,000
Total Sakel	..	..	..	..	..	..	593,570	472,000
Irrigated American :								
Berber Province, Pumps	}	Sagias	..	..	..	..	11,431	—
" " " "								
Dongola Province, Pumps	}	Sagias	..	..	..	..	12,500	—
" " " "								
Zeidab	..	..	..	..	..	..	18,847	—
Private Estates (Berber and Khartoum Province)	..	..	..	..	..	..	13,312	—
Total Irrigated American	..	..	..	..	..	..	56,090	41,000
Rain-grown Cotton :								
Blue Nile Province	..	..	..	..	..	..	500	—
Kassala Province	..	..	..	..	..	..	1,904	—
Kordofan Province	..	..	..	..	..	..	1,587	—
White Nile Province	..	..	..	..	..	..	286	—
Nuba Mountains Province	..	..	..	..	..	..	25,396	—
Upper Nile Province	..	..	..	..	..	..	3,968	—
Mongalla Province	..	..	..	..	..	..	10,000	—
Total Rain-grown Cotton	..	..	..	..	..	..	43,641	20,000
GRAND TOTAL	..	..	..	..	..	..	693,301	

## SUMMARY.

							Equivalent approx. in bales of 400 lbs lint.	
Sakellarides :								
584,550 cantars (315 rottles), assuming 95 lbs. lint								
per cantar	..	..	..	..	..	..	141,182	112,100
American :								
99,300 cantars (315 rottles), assuming 91 lbs. lint								
per cantar	..	..	..	..	..	..	22,689	14,487
Total	..	..	..	..	..	..	163,871	126,587

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## UGANDA

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In the Eastern Province, where 447,000 acres have been planted in cotton, of a total of 700,000 acres in Uganda, forecasts are favourable. The hot dry weather of December favoured the maturing of the bolls, and picking was carried out under good conditions. Large quantities were at the end of December ready for the market, which opened on January 3. In Buganda, where 200,000 acres were sown, prospects are good through the hot dry weather, necessary for ripening, continuing until mid-December. Picking of early varieties was general by the end of December, and marketing will begin on February 1. In the Western Province, where production is smaller, the position was less satisfactory in some districts in mid-January.—(*International Institute of Agriculture.*)

The prospects for the cotton crop during this season is reported favourable by local growers. The yields from various provinces are said to be good, and picking is being carried on in practically all districts. Exports from Mombasa from January 1 to October 31 amounted to about 137,000 bales, whereas the exports during the corresponding period of last season amounted to 132,000 bales.

The exports of lint cotton from Mombasa from January 1 to December 31, 1928, were 138,486 bales, valued at £2,475,328, compared with 131,728 bales, valued at £1,690,838, for the previous year.

Exports of cotton seed for the same period amounted to 45,506 tons, valued at £323,110, as compared with 29,500 tons, valued at £170,303, in 1927.

### EASTERN PROVINCE.

Very hot and dry weather prevailed in all districts throughout the month of January. These conditions favoured the ripening of the crop, and growers in some areas experienced difficulty in keeping pace with the picking.

It is generally anticipated that the total crop will show a considerable increase over that of last year.

### BUGANDA PROVINCE.

The dry weather has continued throughout January, and picking is being carried out under favourable conditions. The quality as regards both grade and staple is reported to be good, and satisfactory yields are being obtained.

### WESTERN PROVINCE.

Reports from Toro district indicate that the condition of the crop is good. In Ankole district there has been some rain, and the plants are flowering and bolling well.

(*Department of Agriculture, Uganda.*)

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## UNION OF SOUTH AFRICA.

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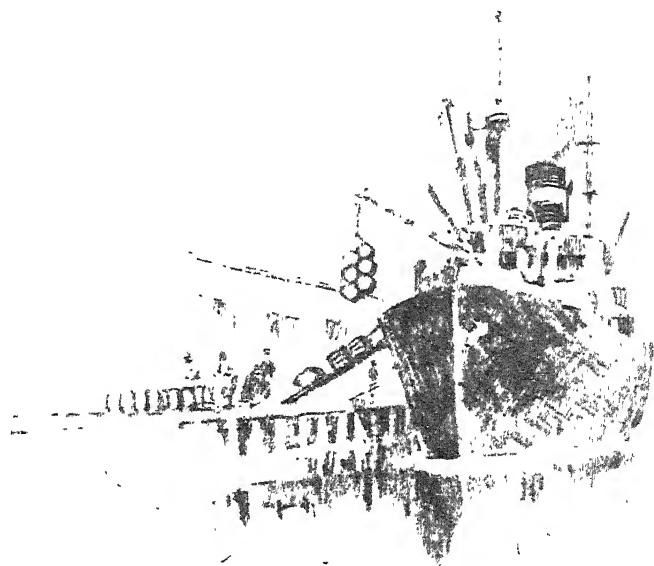
At the end of December the condition of the cotton crop was improved by rain, but does not promise a much larger crop than last season.

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## ST. VINCENT (British West Indies)

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The area planted under Sea Island cotton for the season 1928-1929 is 3,386 acres. This is almost the same as for the previous season. Severe attacks of cotton caterpillar *Alabama argillacea* were experienced during the last quarter of 1928, and soft rot of bolls were responsible for very considerable losses. Rainfall was excessively abundant, so that some early cotton could not be picked. The late cotton will give a fair return if the pink boll-worm does not breed rapidly.—(*International Institute of Agriculture*.)



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## Cotton Standards Conference.

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At the third international biennial Universal Cotton Standards Conference, held in Washington on March 16-19, 65 copies of grade and colour standards were approved for use during the two-year period commencing August 1, 1929. It was agreed that possible modification of these tentative standards, following their use during the two-years period, and provision for more definite promulgation of the standards may be considered at the next biennial conference.

The conference also put on record as urging the improvement of present ginning methods used by American ginners, resulting in deterioration in the quality of spinnable cotton, declaring that poor ginning methods are detrimental to the interests of cotton growers, cotton merchants and spinners.

A proposal to issue physical standards for the grades, good middling spotted to low middling spotted inclusive, and to establish descriptive standards for light-tinged cotton of the same grades was considered, but no conclusion was reached. The new spotted and light-tinged grades have been suggested to take the place of the present descriptive standards for spotted cotton, which embrace all cotton which in colour falls between the present white and yellow-tinged boxes. The European representatives expressed themselves as wishing to withhold a decision for the time being.

The European representatives offered a proposal "that the standards of blue and yellow-stained cotton be transferred to inactive standards, and that such standards be not submitted to be passed at the biennial conferences." No action was taken on this proposal, since these standards are now an essential part of the universal standards, but the matter of their presentation to future conferences was taken under consideration.

The conference considered the inclusion of the Japan Cotton Spinners' Association and the Japan Cotton Merchants' Union as

parties to the Universal Standards Agreements. The Department of Agriculture proposed to allow the Japanese organizations to become parties to the agreements in view of the increasing importance of Japan as a cotton-buying country, now the third largest buyer of American cotton. The European representatives presented the following resolution on this point:—

“In regard to the question of the Japanese Associations becoming signatories to the agreements, the European Exchanges adhere to their previous decision that they cannot agree to any change in the present status. They have no objection, however, to the Department of Agriculture making a separate agreement with Japan, but 50 per cent. of the voting power must be retained by the European Exchanges. Under such circumstances Japan would be welcomed to take part in the passing of the standards.” The Department announced that it would give further consideration to this matter.

The conference approved 65 sets of the Universal Standards for American cotton for use during the next two years. One set was drawn by lot and placed in the United States Treasury as first reserve set. The other sets were also drawn by lot to be distributed among the exchanges, associations and the trade.

European representatives at the conference were as follows:

F. Holroyd and Joseph Wild (Federation of Master Cotton Spinners' Associations Ltd., of Manchester); J. C. Finlay and A. C. Nickson (Liverpool Cotton Association Ltd.); William Heaps, Richard Brooks and H. Robinson (unofficial, Manchester Cotton Association Ltd.); A. Schadegg and J. Westphalen-Lamaitre (Syndicat du Commerce des Cotons au Havre); Heinrich Westerschulte and George Albrecht Furst (Bremer Baumwollbörse); Luigi Garbagnati, Achille Olcese and Dr. Aldo Scaravaglio (unofficial, Associazione Italiana Fascista Degli Industriali Cotoniere); Auguste L. M. Van Horen, junr., Robert Pfieger and Leopold F. Francois (Marche de Coton a Gand); Pedro Baste and Mateo Olive (Centro Algodonero de Barcelona); I. J. Kalmon and C. Stahl, junr. (Vereeniging voor den Katoenhandel te Rotterdam).

## “Net” Weight and Standardizing Cotton Tare.

The Fulmer Cotton Bill, known as the Cotton Net Weight Act, was passed by the House on 25th February. The measure will go to the Senate for adoption.

The Bill provides for the use of net weights in inter-State and foreign commerce transactions in cotton and for a standardization of bale covering for cotton, and authorizes the Secretary of Agriculture to study the materials used for bale covering, and from time to time to establish standards for materials used for bale covering.

The Secretary of Agriculture is also authorized to include in his standards for bale coverings specifications and tolerance as to sizes, weights and patterns. These standards, when established, will be known as the cotton-tare standards.

Provisions of the Bill call for the establishment of the tare standards within one year from the date of the approval of the Act, and that any such standards or change or replacement thereof shall become effective only on and after a date specified in the Order of the Secretary of Agriculture, which date shall be not less than one year from the date of such Order.

The Secretary of Agriculture is further authorized to prescribe maximum weights of bale coverings, including both bagging and ties, used on cotton for shipment in inter-State or foreign commerce, not to exceed 15 lbs. per bale.

Section 4 of the Act points out "that from and after one year following the effective date of official cotton-tare standards all American cotton shall be quoted, bought and sold for shipment in inter-State and foreign commerce on net weights, excluding in each instance the weight of bagging, ties and patches."

In the testimony taken by the House Agricultural Committee during the consideration of the measure it was shown that the prevailing practice among American shippers of cotton to European markets is to deduct 6 per cent. from the total weight of each shipment as tare, which, on the average bale of 500 lbs., figures from 26½ to 27½ lbs. per bale for bagging and ties, and the result of the practice is that the producer is compelled to place or cause to be placed more wrapping on the cotton than is really necessary, which operates as an unnecessary charge upon the industry and as an economic loss to the producer in the way of excessive freight, insurance and various other charges.

"The operation of the Bill, if enacted into law," the report pointed out, "will reduce the tare and have the effect of greater uniformity and less loss in connection with the tare on cotton sold and delivered on foreign markets.

Another advantage arising from the proposed legislation is that bagging made from low-grade cotton would be substituted and used as wrapping instead of jute or burlap, as is now the practice."

Investigations made by the Department of Agriculture disclosed the fact that bales of cotton wrapped in cotton bagging make a more attractive and better appearance when placed on the market, and that there will be less waste, cheaper insurance rates, and a consequent economic saving to the producer, shipper and manufacturer.

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## Preliminary Final Ginning Report.

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The Census Bureau on the 20th March issued its preliminary final report on the American cotton crop grown in 1928. It shows that 14,269,000 *running bales* were ginned, against 12,783,000 bales in the previous year, 17,775,000 bales two years ago, and 16,123,000 bales three years ago. The average weight of bales is returned at 506.3 lbs., against 506.8 lbs., 505.3 lbs. and 499.5 lbs. for the three previous seasons; so that the final ginnings, expressed in bales of 500 lbs., will amount to 14,450,000, against 14,373,000 as estimated by the Crop Reporting Board on December 8th, 1928.

The total included 673,000 round bales, against 550,000 last year, and 28,000 bales American-Egyptian, against 24,000 bales.

The quantity remaining to be ginned after the March canvass and included in the figures below is estimated at 72,000 bales, against 22,000 bales a year ago.

The following table gives details with comparisons:—

	1928-29	Estimated <sup>*</sup> production	1927-28	1926-27	1925-26
		Dec 1 1928			
Alabama .. ..	1,096,000	1,090,000	1,173,430	1,470,404	1,356,402
Arizona .. ..	146,000	134,000	90,281	120,089	115,359
Arkansas .. ..	1,208,000	1,215,000	979,481	1,513,382	1,594,389
California .. ..	171,000	155,000	89,998	128,835	122,260
Florida .. ..	20,000	20,000	17,361	33,231	40,208
Georgia .. ..	1,052,000	1,020,000	1,111,399	1,498,473	1,192,952
Louisiana .. ..	685,000	685,000	543,153	826,179	912,246
Mississippi .. ..	1,459,000	1,470,000	1,346,489	1,857,525	1,985,524
Missouri .. ..	145,000	146,000	116,024	215,769	292,950
New Mexico .. ..	82,000	70,000	94,920	70,206	64,706
N. Carolina .. ..	867,000	840,000	879,677	1,246,754	1,147,340
Oklahoma .. ..	1,186,000	1,180,000	1,009,626	1,760,644	1,680,304
S. Carolina .. ..	713,000	725,000	738,550	1,025,991	929,040
Tennessee .. ..	421,000	420,000	355,975	442,052	513,130
Texas .. ..	4,937,000	5,150,000	4,229,367	5,477,788	4,098,249
Virginia .. ..	45,000	44,000	30,705	51,891	54,016
Other States .. ..	6,000	9,000	6,676	15,857	23,441
Total .. ..	14,269,000	14,373,000	12,783,112	17,755,070	16,122,516

\* Bales of 500 lbs

#### DISTRIBUTION.

Square bales .. ..	13,933	12,508	17,423	15,947
Round bales .. ..	673	550	664	351
Average gross weight per bale, in lbs. .. ..	506.3	506.8	506.3	499.5
Equivalent 500-lb bales (gross)	14,450	12,956	17,977	16,104
Remaining to be ginned .. ..	72	22	234	81
Active ginneries (actual) .. ..	7	14,863	15,753	15,482
Linters (running bales) .. ..	7	875	1,042	1,044

<sup>\*</sup> Includes 28,000 bales American-Egyptian cotton for 1928-29, 24,223 bales for 1927-28, 16,232 bales for 1926-27, and 20,653 bales for 1925-26.

<sup>\*</sup> Not received.

## RAW COTTON TARIFF PROPOSALS.

The question of a tariff on raw cotton was again brought before the House Ways and Means Committee during the hearings on the free list. Mr. Chester H. Gray, Washington representative of the American Farm Bureau Federation, urged duties on both long-staple and short cotton, calling the former a present need and asking the latter for future protection. His suggested duties were as follows:—

Shorter than $1\frac{1}{16}$ in, 6 cents.	$1\frac{3}{32}$ , 15 cents.
$1\frac{1}{16}$ , 7 cents.	$1\frac{1}{16}$ , 16 cents.
$1\frac{3}{32}$ , 8 cents.	$1\frac{11}{32}$ , 17 cents.
$1\frac{1}{2}$ , 9 cents.	$1\frac{1}{2}$ , 18 cents.
$1\frac{3}{32}$ , 10 cents.	$1\frac{7}{16}$ , 20 cents.
$1\frac{3}{8}$ , 11 cents.	$1\frac{1}{2}$ , 22 cents.
$1\frac{3}{32}$ , 12 cents.	$1\frac{1}{2}$ (or longer), 24 cents.
$1\frac{1}{2}$ , 14 cents.	

Mr. Albert F. Bemis, of Boston, in opposing proposals for a

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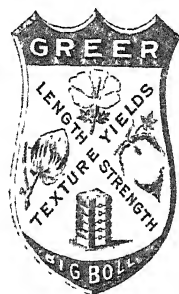
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3-cent tariff on raw jute, said that within the next 25 years cotton will be grown for the food value of its seed and the lint may be a by-product.—*Commerce and Finance*.

## Mechanical Harvesting of Cotton in N.W. Texas.

Circular No. 52, issued by the Texas Agricultural Experiment Station, written by Mr. D. L. Jones, in collaboration with Mr. W. M. Hurst and Mr. D. Scoates, deals very thoroughly with the mechanical harvesting of cotton.

The writer describes the development of the cotton sled in its various types; the finger type, the slot type and commercial strippers. In the case of the finger type a two-row and a four-row sled has been used, but these are mounted on wheels instead of skids.

Tests made of a number of sleds and stripper harvesters show that the loss from these machines, excluding cotton on the ground previous to harvesting, was about 9 per cent. Some, however, were operating with a loss of only 4 to 5 per cent., while others were losing as much as 15 to 16 per cent.

The approximate cost of harvesting and ginning picked, snapped and sledded cotton in 1927 in Lubbock County is shown in the following table:—

TABLE II.—\* APPROXIMATE COST OF HARVESTING AND GINNING PICKED, SNAPPED, AND SLEDDED COTTON IN LUBBOCK COUNTY, TEXAS, 1927.

Method of Harvesting	Pounds required to make a 500-lb. bale (approx.)	Harvesting Cost		Ginning Cost		Total
		Per cwt	Per bale	Per cwt	Per bale	
		\$	\$	\$	\$	\$
Picked ..	1,400	1 50	21 00	6 40	5 60	26 60
Snapped ..	2,100	0 75	15 75	0 50	10 50	26 75
Sledded ..	2,900	—	2 55	0 50	14 50	17 05

\* Requirements and cost for picking, snapping and sledding cotton in West Texas and Oklahoma, Bureau of Agricultural Economics, U.S. Department of Agriculture, Preliminary Report.

The mechanical cotton picker differs from the cotton stripper in that it picks the cotton from the boll much the same as cotton is picked by hand.

The principle that seems to have worked out most successfully, and that shows the greatest possibilities, involves the use of seriated spindles to do the picking. The most successful machines of this type have two large cylinders with vertical axes that are studded with these spindles. Spindles are placed close enough so that they pretty well cover the cotton plant as it passes between the two cylinders. These cylinders revolve at such a speed that the spindles have no forward motion at the moment they are in contact with the cotton. At the same time the spindles are revolving so that the

cotton becomes attached to them. Then, as the spindles move back, they reverse their action; the cotton is cleaned off and conveyed to the container on the rear of the machine. Two machines of this type are being developed at the present time.

As a result of the active interest during the past two years in the mechanical harvesting of cotton, very rapid strides have been made in the solution of this problem. The conditions which have led towards this widespread interest are many. Perhaps the greatest factor has been the rapid migration of farm labour to urban centres, which has resulted in a shortage of labour, thus causing farm operators to look for solutions not only to their cotton-harvesting problems but to all their farm-operation problems. The result has been the rapid development of power farming and the introduction of the tractor. Large cotton acreages in this State are now worked by means of tractors, two- to six-row machines being used. When all the other farm operations, with the exception of cotton chopping and cotton picking, are done on a large scale, it naturally follows that these two operations will necessarily receive concentrated attention. The cotton-chopping problem is not of much concern in West Texas because very little of the cotton is chopped. The harvesting problem is thus the limiting factor in producing cotton in this region.

Whether the cotton stripper is the logical answer to the mechanical harvesting of cotton cannot as yet be decided. It has many things in its favour. The machine is inexpensive; can be built in large units; is easy to operate; harvests cotton six or seven times faster than can be done by hand-picking, and gathers a large per cent. of the cotton. The gins are now prepared to handle stripped cotton.

Whether it can be used elsewhere than in West Texas is not as yet known. In 1928 experiments will be carried on at other localities in Texas to determine whether such harvesters can be used with success. Those who are familiar with the possibilities of cotton breeding feel that they will be able to breed a type of cotton, if necessary, which can be sledded.

Mechanically harvested cotton, whether it is picked or stripped, is not necessarily of a lower grade than hand-picked cotton. There is enough evidence at hand at the present time to prove that cotton harvested by either of these methods under proper conditions will give a good grade. In fact, it has been demonstrated that stripped cotton cannot be distinguished from hand-picked cotton when properly handled. Sledded cotton has a bad reputation because it is very often a salvage proposition, with the result that the cotton is very inferior under the best of conditions.

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## Soil Erosion in Texas.

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Mr. A. B. Conner, director of the Texas Agricultural Experiment Station, according to the *Acco Press*, has recently conducted tests to determine the amount of water run off, soil erosion, and the effect of water conservation on growing crops. The equipment for the first consisted of a number of small control plats of one-twentieth

of an acre area, graded to varying slopes (level, 1, 2 and 3 per cent. fall) and planted to different crops and grass or left fallow. At the lower end of each plat was a covered concrete pit into which the water and silt could wash, so that after each rain the run-off could be measured and the silt oven-dried and weighed.

The results were astonishing. They showed that at the end of the first year, during which time 25.30 inches of rain had fallen, on a barren and uncultivated plat with a slope of 2 feet per hundred, the washing of oven-dried soil was 41 tons per acre. Other plats eroded to a lesser degree, depending upon the crop; grass lost the least, 11 tons.

During this same period the water run off on the naked plat was computed to be 44 per cent., or 11 inches, which is in itself almost sufficient to grow a crop of milo in West Texas. During one exceptionally hard rain of 1.6 inches on July 6, the run-off loss ranged on the different plats from 85 to 93 per cent., leaving a moisture in the soil of less than one-fourth of an inch. When it is considered that 25 per cent. of the rainfall in West Texas comes in scattered showers, and is therefore lost by evaporation, the significance of this run-off becomes more apparent.

The second set of experiments were carried on in a 150-acre cotton patch divided into field plats of 10 acres each. On these plats various obstacles (contour rows, terraces of different fall, and dykes) were constructed to determine the best way of holding the water and the subsequent effect on the yield of crops.

The results here were as surprising as those of the control plats. They disclosed that the rainfall could be completely retained and that on plats that were contour-terraced and surrounded by dykes the yield was increased by 283 lbs. of lint cotton per acre, or 40 per cent. over the plats with no terraces and with rows running downhill.

Mr. Conner has established, through his experiments, that enormous quantities of valuable water runs to waste off the West Texas lands with each rain, causing serious flood damage on the larger rivers; that an unwarranted amount of surface soil is carried away, causing the silting-up of the rivers. Mr. Conner is of the opinion that this erosion and water run-off can be controlled to the benefit of the farmer if he will only take steps to hold the water on his land.

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## Analysis of Proposed Change in Staple Length—Basis of Cotton Futures Contract.

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By ARTHUR W. PALMER, in Charge, Division of Cotton Marketing  
Bureau of Agricultural Economics, U.S. Department of Agriculture.  
(Reprinted from "Textile World" Annual Review Number.)

**T**O undertake the consideration of any question related to cotton futures markets is usually to find that its roots run deeply. In many cases the merits of the question are obscured by lack of basic fact material. To some extent this is true of the question now under discussion, namely, whether it would be desirable to change the staple basis of the futures contract from  $\frac{3}{4}$  in., which now is the minimum length practicable under the law, to 1 in., or possibly  $1\frac{1}{16}$  ins.

In taking up such a discussion it should perhaps be noted at the outset that the final determination of what should be the staple basis of the cotton futures contract used in American markets is a matter which falls within Congressional jurisdiction. Congress, in the United States Cotton Futures Act, has declared that in the settlement of the contract actually used in the futures markets of the United States, "No cotton that is less than  $\frac{7}{8}$  in. in length of staple shall be delivered." The law is silent otherwise regarding staple requirements, and, so long as this is so, the way is left open to the futures markets to specify a longer staple in their contract forms. It is presumable, however, that Congress might in such a case feel that some further action of its own were needed. Such comments and discussion as may be offered are therefore the impressions which grow out of administration of the legislation.

To appraise such a change and its probable consequences it may be well first to consider what are the facilities which futures markets may be reasonably expected to afford, then to enumerate some of the things desired with respect to these facilities, and finally to examine the proposition in detail and see, as nearly as may be, whether the proposed change might operate to bring the desired ends within reach or otherwise.

Such a discussion must in the nature of the case be somewhat technical, and to keep it within reasonable space limits it must be assumed that the reader has some familiarity with the organization, operations and usages of the cotton futures markets and with the mechanics of hedging, all of which have, of course, been repeatedly described.

#### FUTURES MARKET FACILITIES.

The major services which the futures markets render seem now rather surely to be found in the functions of price protection, sometimes spoken of as price insurance, and of price registration. The price protection or insurance function takes the form of hedges, while the registration of prices finds expression in quotations, both of which are facilities to the cotton world.

There seems to be a close relation between these two functions. The prices "registered" and quoted from moment to moment in the futures markets represent, of course, the levels at which prices are being "insured" or may be then insured. Normally these levels are the resultant of six forces, namely, the demand for contracts for hedge purposes, the supply of contracts for hedge purposes, the supply of contracts available from the reservoir of speculative interest, the demand for contracts from the same source, the supply from arbitrage traders and the demand from this source. Prices of spot cotton have come to be based very generally upon futures, because the price which can be most confidently paid for spot cotton is the insurable price.

The price insurance available in futures markets is not, of course, complete. Not only does it not cover such factors of price as grade differences and staple premiums, but, as has often been pointed out, it leaves also a variable factor, popularly known as "the basis," uncovered. The basis, as used here, may be defined as the differential expressed in points or hundredths of a cent a pound, between the price of middling spot cotton, of a given staple, and a given futures price. Elsewhere the term is used to mean the designated grade or staple from which prices of other grades or staples are calculated, and the distinction should be kept in mind. Much, if not most, of the discussion of futures problems in recent years has had its source in the fluctuations of the basis, which may be sufficiently wide to make hedges a cause of loss.

Fluctuations in the basis also detract from the reliability of futures prices as indices of spot cotton values. It is apparent on a moment's reflection that, as the fluctuation of the basis is lessened, the security of the hedge is enhanced, and at the same time, and to the same degree, futures quotations become a more dependable index of current spot cotton values. Therefore the better the hedge protection the futures markets afford, the more valuable become their quotations.

The existence of these facilities has doubtless a far-reaching effect upon the entire system for marketing the cotton crop. Continuity of the market for spot cotton, the spread between growers' selling prices and manufacturers' buying prices, availability of credit for the movement of the crop,

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and rates of interest on cotton in the bale are all affected in greater or less degree by the use of hedges and the dissemination of futures quotations.

#### THE INTEREST IN FUTURES MARKETS.

While there may be some difference in the emphasis with which growers, merchants and manufacturers would state the items of their desires with respect to what futures markets can afford them, many of these in the end might be reduced to two elements, safe hedges and good quotations.

The grower, whether he is a member of a co-operative association or not, is directly concerned with the quotations. He knows that his price is calculated from the futures price, and he wants the futures price to be the result of fair interplay of forces in the futures markets. He wants that price to be expressed in a quotation which he may regard as indicating to him as nearly as possible the market value of his cotton, and which will help him as a seller to bargain in his market on fair terms with the buyer. Indirectly, the grower's interest is in the advantages which may accrue to him from such a wholesome state of affairs in the market for his product as will assure that it will be distributed to its users with the greatest efficiency and least cost. He wants a share of whatever benefits in the form of reduced marketing costs may come from safe hedges for the merchant and manufacturer. He wants a share of whatever advantage may come from cheaper money rates and more liberal credit available to cotton safely hedged. He wants buyers for his product in the market every day of the year, and, if safe hedges on cotton for the merchant and manufacturer will make this possible, he is highly interested in safe hedges. The grower is therefore concerned both with the price registration function and with the price insurance function of the futures market.

The manufacturer's interest, if it may be judged by the extent to which cotton is purchased on call, is also in safe hedges and good quotations, and, in many respects, is similar to that of the grower. He wants, of course, to be able to contract for his raw material in a way that will assure him the qualities he will need over a period of time, to have the cotton delivered as he needs it, to pay for his cotton as he gets it, and to fix the price of his purchases as he sells his yarns or goods. If hedges, placed either by himself or by the merchant who supplies him, make it possible for him to buy in this way and to economize in the amount of funds tied up in raw cotton, he is interested in the quality of the hedge. He would like at times to protect himself against fluctuations in the price of finished goods in stock. He frequently uses futures prices in calculating the price at which he can sell his product, and is interested that these prices hold as constant a relationship to the prices of spot cotton as possible.

The merchant, as a group, wants safe hedges for the protection of his capital, both his own and his banker's. Without this protection he hesitates to buy cotton from the grower which he cannot immediately sell to a mill, or to sell cotton on call to a mill, or to accept an order at a fixed price for cotton which he does not actually have in stock. Fluctuations in the basis are his bane. In hoping for a stable basis he is hoping for the condition which improves the index quality of futures quotations. He uses futures quotations constantly in making his price calculations, both for buying and selling.

#### THE PRESENT FUTURES CONTRACT.

The futures contract is highly standardized, the contract of each market being exactly like every other except as to the names of buyer and seller, the price and the month of delivery. Its standardization makes it quickly negotiable and adapts it to the requirements of hedges and price quotations. The price named in the contract is the price at which the buyer will compensate the seller for cotton of Middling grade not less than  $\frac{3}{8}$  in. in length of staple. The seller has the option, however, of delivering certain other grades in any quantity, the lowest of which are fixed by law. If the grades are higher or lower than Middling the seller may invoice them at prices as much above or below the price of Middling as the commercial differences in their value, determined in accordance with law. Recently, the American futures markets have made modifications in the terms of their contracts which permit, or will presently permit, sellers, at their option, to deliver cotton of  $\frac{15}{16}$  in. and 1 in. lengths in set-off, in invoicing these longer

staples at the price of  $\frac{3}{4}$  in. cotton of the same grade, plus 60 per cent. of the commercial premiums which  $\frac{1}{2}$  in. and 1 in. cotton command over  $\frac{3}{4}$  in. cotton. The method of determining these premiums is slightly different in different futures markets, but the allowance of 60 per cent. is the same in all.

#### POSSIBLE EFFECTS OF CHANGING STAPLE BASIS.

While the desirability of changing the staple basis of futures contracts from  $\frac{3}{4}$  in. to a longer staple is to be found in the effect which would be produced upon handling margins, credit, forward sales of actual cotton and the like, the change would show first in its effect upon hedge facilities and futures quotations. The effect here is somewhat susceptible of measurement, and for  $\frac{3}{4}$  in. and 1 in. cotton there are some figures which may be useful. Unfortunately, few are available for  $1\frac{1}{4}$  in. cotton, and for that reason the discussion is limited to a comparison of the advantages of  $\frac{3}{4}$  in. with 1 in. staple as a futures contract basis.

The question divides itself into two parts at this point, which, for the purposes of the discussion, may be expressed about as follows:—

“Would it be desirable to make a longer staple, say 1 in. or  $1\frac{1}{4}$  in., the basis of the contract to the exclusion of shorter lengths?” and

“Would it be desirable to make 1 in. or  $1\frac{1}{4}$  in. the staple basis of the contract, allowing  $\frac{1}{2}$  in. and  $\frac{3}{4}$  in. cotton to be delivered at their respective commercial discounts?”

The effect of the difference in staple length alone upon the futures price level which might be expected should in either case be about the same. That is to say, the futures prices should be enhanced by as much as inch cotton is worth more than  $\frac{3}{4}$  in. cotton. In the past 17 months for which data are available the monthly average of this premium has been as much as 150 points and as little as 75 points. For the month of December, 1928, it was 80 points.

From the grower's standpoint, the probable elevation of the futures quotations of three-quarters of a cent to  $1\frac{1}{2}$  cents a pound should be welcome if it were unaccompanied by any interruption of continuity or other serious effect upon his market, resulting from disturbance of the hedge and price registration machinery, not because it would raise the price level of the crop as a whole, for there is no reasonable basis for such an assumption, but because to some extent it might improve his position when, as a seller, he undertakes single-handed to treat with his buyer. The grower generally realizes that the price he receives is usually calculated from the prices quoted in the futures markets. These quotations he knows are widely, promptly and intensively disseminated through a telegraphic service which extends even into the small markets. He frequently has access to them himself. He may not always realize that these quotations are based on  $\frac{3}{4}$  in. cotton. If he does, he is likely nevertheless to be not so well informed as to the premiums which longer staples should command, for such information travels out from central markets less rapidly and comes to the grower's attention less emphatically. On this account he is unprepared to ask for the premium on better staples to which in justice he is entitled. If the basis of the contract were inverted so that the futures quotation represented, say, 1 in. cotton rather than  $\frac{3}{4}$  in., he would, of course, have to accept a discount for staple if his cotton were less than 1 in. in length of staple, but he would at least know that he was taking a discount, and eventually might know what a fair discount should be, where now he may overlook his right to a premium entirely.

This advantage and any others ought to be weighed by the grower side by side with the possible effect of the changed contract upon the general market structure and of its influence upon his market. Again the discussion must turn to a consideration of hedges and quotations. Here it appears the two suggested new contracts would function so differently that it seems necessary to discuss them separately.

#### AN INCH CONTRACT WITH SHORTER LENGTHS EXCLUDED.

With respect to the proposition that nothing shorter than 1 in. cotton be deliverable, the following inquiries suggest themselves:—

(1) Would the hedge provided cover the crop more or less completely than at present?

(2) Would the basis fluctuations likewise be more or less severe than at present?

The first of these can best be answered by referring to figures showing the staple lengths of cotton produced. For a sound conclusion a five-year series should be taken. Unfortunately such figures are not available. In fact, the only figures as yet available are the estimates for that part of the present crop ginned prior to December 1, 1928. These may be enough of an indication to have some value. Excepting cotton of the Pima variety, they are:—

$\frac{3}{16}$ and under ...	...	...	...	13.33	per cent.
$\frac{5}{16}$ ...	...	...	...	41.60	"
$\frac{3}{8}$ ...	...	...	...	23.32	"
1 and $1\frac{1}{8}$ ...	...	...	...	11.72	"
$1\frac{1}{16}$ and $1\frac{3}{32}$ ...	...	...	...	5.11	"
$1\frac{1}{4}$ and $1\frac{5}{16}$ ...	...	...	...	3.29	"
$1\frac{1}{2}$ and $1\frac{3}{4}$ ...	...	...	...	1.24	"
$1\frac{3}{4}$ ...	...	...	...	0.22	"

According to these data, it will be seen that the proportion of the crop as a whole, which is  $\frac{3}{8}$  in. and  $\frac{5}{16}$  in., was about 65 per cent. In some particular States it was much greater. If cotton less than  $\frac{3}{8}$  in. be included the figure is raised to over 78 per cent. for the whole belt. To make cotton of these lengths untenderable on futures contract would be in effect to deny the protection of hedges to from two-thirds to more than three-quarters of the crop. That part of the ginnings which were 1 in. in staple and would have been completely covered was a fractional part of 11.72 per cent., the percentage figure for 1 in. and  $1\frac{1}{8}$  ins. combined. Somewhat more protection would doubtless be afforded  $1\frac{1}{16}$  ins. and  $1\frac{3}{32}$  ins. cotton, but these were only 5.11 per cent.

The present contract, based on  $\frac{3}{8}$ -in. staple, appears to have afforded direct protection to 41.60 per cent. of the ginnings and partial but fairly substantial protection to both  $\frac{5}{16}$  in. cotton, which was 23.32 per cent., and to 1 in. cotton, which, if calculated as half of the total credited to 1 in. and  $1\frac{1}{8}$  in. was about 5.86 per cent. The total percentage of ginnings under complete and nearly complete protection was thus about 71 per cent.

It appears from these figures that the direct hedge protection of a futures contract based on 1 in. staple would be only about one-eighth as much as it is under the present contract, and that by the most liberal construction the total of partial and direct protection under such a contract would be barely more than a fifth of what it is at present. These figures point an answer to the question, from the grower's and merchant's standpoint, of which contract offers the broadest protection to the crop. From the spinner's standpoint the answer is hardly different. The estimated consumption for the year ending July 31, 1928, distributed staple length as follows:—

$\frac{3}{16}$ and under ...	...	...	...	1.44	per cent.
$\frac{5}{16}$ ...	...	...	...	28.81	"
$\frac{3}{8}$ ...	...	...	...	27.34	"
1 and $1\frac{1}{8}$ ...	...	...	...	28.45	"
$1\frac{1}{16}$ and $1\frac{3}{32}$ ...	...	...	...	5.71	"
$1\frac{1}{4}$ and $1\frac{5}{16}$ ...	...	...	...	4.19	"
$1\frac{1}{2}$ and $1\frac{3}{4}$ ...	...	...	...	3.86	"
$1\frac{3}{4}$ and over ...	...	...	...	0.20	"

According to these figures, 56.15 per cent. of the cotton consumed last year, which is now either partially or fully capable of hedge protection, would have been "outlawed" and left without either direct or partial protection. This would seem to be reason enough to dispose of the whole proposition of a contract based on 1 in. staple with  $\frac{3}{8}$  in. and  $\frac{5}{16}$  in. cotton excluded. Nevertheless, the relation of the sufficiency of the supply of 1 in. cotton for contract requirements to hedge security is worth examining.

#### MUST AVOID CAUSES OF "SQUEEZES."

It must be remembered that every hedge contract made by a sale in the futures market is an obligation to deliver. When the buyer wants cotton delivered he has only to wait for the contract to mature. The seller must deliver actual cotton or else "buy a contract" in the same month and balance off one against the other in the clearing house. If, at such a time,

sellers as a group find their situation such that it is a hardship to make delivery, a condition results which is known as a "squeeze." In times of "squeeze," sellers become so few that a purchase in the squeezed month to recover a hedge can be usually made only at a loss.

The consequences of a squeeze are several. The losses which are sustained destroy the usefulness of hedges in the near month. If at such a time there is an insufficiency for delivery purposes of cotton of tenderable grade and of a staple length which is tenderable, both legally and economically, the situation may become so acute that there is a succession of discounts on all of the active months. When this condition occurs there is no way of transferring hedges from near months as they mature to more distant ones without almost certain loss. Hedges have to be taken out; futures prices lose much of their relationship to spot prices; spot cotton everywhere is likely to be pressed for sale; mill calculations are upset; buying in the spot markets narrows down to hand-to-mouth trading; prices become irregular because there is a general unwillingness to buy cotton and carry it without hedge protection unless it can be bought cheaply enough to warrant taking the risk of carrying it unhedged.

Is the supply of inch cotton sufficient to give assurance that the possibility of squeezes is no greater than it is now?

It would be useful to know, in this connection, just what the possible cotton requirements for futures settlements may be at any time. Unfortunately there is a blind spot in the data on this point. Some little indication, however, may be found in the amounts of cotton delivered from time to time in the past.

The greatest amount of cotton certificated for delivery on futures contracts in all markets in any one month for which Department of Agriculture records are available is 183,359 bales. In the season 1924-25 the total number of bales inspected for delivery on futures contracts of the New York Cotton Exchange amounted to 255,028 bales. Deliveries in the same year are recorded as being 952,700, but this figure obviously includes redeliveries of the same cotton. None of these figures are very illuminating for the purpose, since shipments to New York for futures deliveries presumably have occurred only as the near month reached a figure which made it practicable to incur the additional expense of shipment to that market. Doubtless when this involved a loss on hedges many hedges were taken out at a lesser loss before this point was reached. With provision for deliveries in five Southern ports in addition to New York there may be more tendency to settle by delivery, and hence a greater possible need for actual cotton for that purpose.

The figures given above and those for the carry-over on August 1, 1928, may be of some value as indicating the relative amounts of Upland cotton of each staple length available.

					Ginnings to December 1, 1928, Per cent.		Carry-over August 1, 1928, Per cent.
$\frac{7}{8}$	...	...	...	...	41.60	...	19.2
$\frac{15}{16}$	...	...	...	...	23.32	...	16.83
1 and $1\frac{1}{32}$	...	...	...	...	11.72	..	26.01

Of the ginnings, if a total be taken of  $\frac{7}{8}$  in.,  $\frac{15}{16}$  in. and half of the figure given for 1 and  $1\frac{1}{32}$  in., the figure is 70.88 per cent. eligible for delivery on the present contract. Of the ginnings, 41.60 per cent. were eligible both legally and economically for delivery on futures contracts, and, using half of the percentage figure for 1 and  $1\frac{1}{32}$  as representing 1-in. cotton to combine with the figure for  $\frac{15}{16}$  in., 29.18 per cent. more was tenderable at a loss of but 40 per cent. of its premium over  $\frac{7}{8}$  in., making a total of 70.78 per cent. ultimately available for delivery on contracts. This figure compares with a possible 5.86 per cent. for 1 in., or, if there is any doubt of the validity of the division, of 11.72 per cent. for both 1 in. and  $1\frac{1}{32}$ . These figures take no account of grade, it being assumed for the purposes of the discussion that the grades available would be proportionate in all lengths.

The carry-over figures are slightly more favourable to the 1-in. contract, but only slightly and not enough so to change the conclusion at all.

On the possibility of there being a famine of tenderable cotton the history of the season of 1925-26 may throw some light. Quotations for that year show the near months for a great part of the season at a premium and the distant months at discounts. The season was a most difficult one

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from any standpoint. Shippers complained generally that owing to the low grade of the crop the supply of  $\frac{3}{8}$  in. cotton of tenderable grade was so limited that they could not make deliveries, and it was with the thought of preventing a recurrence of this condition that action was then begun to permit the delivery of  $\frac{1}{8}$  in. and 1 in. cotton at a part of their premiums. The incident illustrates the need for guarding against any change in the contract which would expose hedge contracts to the danger of an insufficient supply of cotton for futures delivery purposes. Limiting the delivery to 1-in. cotton alone would seem to be courting danger of that kind.

There is one other possible consequence of too great restriction of the quantity of cotton deliverable which ought perhaps to be noted. That is that if the probability of squeezes becomes too great, sellers become timid about placing their hedges in markets where they will encounter this danger. This limitation in the use of hedges is reflected in a restriction of the merchant demand for spot cotton, and so constitutes a restriction of the benefits to growers which is expected to follow from a free use of the hedge facilities of futures markets. Carried far enough, it is conceivable that merchants might choose generally to place their hedges in futures markets in other countries rather than subject themselves to the risk of squeezes, a development which would, of course, tend to cause spot prices to be calculated from foreign futures prices and decrease the usefulness of American futures quotations as indices of spot values in this country.

#### AN INCH CONTRACT.

If the proposition is broadened to mean that  $\frac{3}{8}$  in. and  $\frac{1}{2}$  in. cotton are to be deliverable at a discount, the objection cited will, of course, largely disappear. The attractiveness to the buyer of a contract which permits the delivery of several lengths is somewhat less than that of a contract calling for a single length, since he must contemplate that he may receive a number of different staple lengths instead of a lot of even-running staple. With  $\frac{3}{8}$  in. and  $\frac{1}{2}$  in. staple deliverable, however, basing the contract on 1 in. staple would not, of course, make it any different in that respect from what it is now.

A futures contract specifying 1-in. staple with  $\frac{3}{8}$  in. and  $\frac{1}{2}$  in. staple also deliverable would permit the delivery of as much cotton as is deliverable now, and thus make the danger of a near-month squeeze from lack of deliverable cotton no greater than it is at present, and certainly much less than it would be if  $\frac{3}{8}$  in. and  $\frac{1}{2}$  in. staples were not deliverable.

The possibility of disturbance to the basis on 1-in. spot cotton should be, therefore, no greater than it is now to the basis on  $\frac{3}{8}$ -in. spot cotton, and no special interference with the quotation function of the futures markets would seem to result from this cause.

The question that seems to stand out most clearly relates to the effect which the change might have upon lengths other than 1 in., which are now or would then be exposed to fluctuations of their staple premiums even though hedged. These fluctuations, through the periods for which figures are available, are represented graphically in Charts 1 and 2.

It is apparent from these figures and the graphs that the security of hedges on such lengths as  $1\frac{1}{16}$  in. and  $1\frac{1}{8}$  in. cotton could be somewhat improved, and it seems fair to assume that this would also be true of hedges on cotton of such intermediate lengths as  $1\frac{3}{16}$  in. and  $1\frac{1}{4}$  in. At the same time hedges on  $\frac{3}{8}$ -in. cotton would be exposed to the hazard of fluctuations in staple discount on spot cotton of that length. How hedges on  $\frac{1}{2}$ -in. cotton would be affected is slightly problematical, since figures are not available to show whether over a period of years the value of this length parallels that of  $\frac{3}{8}$ -in. cotton either more or less closely than it parallels the value of 1-in. cotton. In the seventeen months for which figures are available, and which have been graphed in Charts 1 and 2, it would appear that the results to hedges on  $\frac{1}{2}$ -in. cotton would have been about the same either way.

It may be argued that a change of the staple basis of future contracts from  $\frac{3}{8}$  in. to 1 in. would, by giving the cotton grower a futures price quotation on inch cotton and enhancing the safety of hedges on that and longer lengths, have the ultimate effect of encouraging the production of those lengths of cotton which seem now to offer the greatest future opportunities for the American cotton grower, and that from the standpoint of broad policy this change would be beneficial. The reasoning is doubtless

sound and forceful, and the objective is one which should have the best of attention. This argument, however, touches the large question of what services should be expected of the futures markets. If, as many believe, their greatest service would be in furnishing quotations that are the truest reflection of spot values, and providing hedging facilities that will take the greatest amount of risk out of cotton marketing, thus permitting the crop to be distributed most efficiently and cheaply, then changes in the contract should be considered primarily from the point of view of the crop as it is grown, and the problem of the staple quality of American cotton production should be regarded as a matter to be dealt with by more direct means, except as it may be dealt with through the futures markets without involving the primary functions of those markets.

#### FIFTEEN-SIXTEENTH INCH A FAIRER BASIS.

So far as may be judged from the limited data available, it would appear that taking each length individually, the number of bales of  $\frac{3}{4}$ -in. cotton exceed any other, and that this length is best entitled to direct protection. Taking the crop and consumption as a whole, however, a contract based on  $\frac{5}{8}$ -in. staple may not furnish so broad a protection as a contract based on a length of staple more nearly approaching a weighted average of the lengths which may be most successfully hedged. Calculations of average staple length have been made from available figures on the domestic consumption for the year ending July 31, 1928, the carry-over of cotton in the United States on August 1, 1928, and the ginnings from the current crop prior to December 1, 1928.

In the calculations the following lengths of staple were averaged:  $\frac{1}{2}$  in. and under,  $\frac{5}{8}$  in.,  $\frac{1}{2}$  in., 1 and  $1\frac{1}{2}$  in.,  $1\frac{1}{8}$  in. and  $1\frac{3}{4}$  in., using the number of bales of each length as weights. The weighted average lengths thus obtained, expressed in thirty-seconds of an inch, and the nearest standard staple lengths are:—

			Weighted Average.		
			Nearest Weighted Average		Nearest Standard
Consumption	...	...	30.18	...	$\frac{15}{16}$
Carry-over	...	...	30.56	...	$\frac{11}{16}$
Ginnings to December 1...			20.02	...	$\frac{29}{32}$

Excepting  $1\frac{1}{2}$ -in. cotton and over, the average staple length of ginnings was apparently just about half way between  $\frac{7}{8}$  in. and  $1\frac{1}{8}$  in., the average of consumption slightly over  $\frac{15}{16}$  in., and the average of the carry-over was somewhat over  $\frac{11}{16}$  in., being slightly nearer  $\frac{3}{4}$  in.

#### ADVANTAGES OF FIFTEEN-SIXTEENTH INCH BASIS.

These figures suggest the possibility that the interests of cotton growers, manufacturers and merchants might be served if the staple basis of contracts were raised from  $\frac{3}{4}$  in. to  $\frac{15}{16}$  in., allowing 1-in. cotton to be delivered at a proper premium and  $\frac{3}{4}$ -in. cotton to be delivered at its commercial discount. Unless further study developed some weakness in the suggestion not now apparent, such a change would appear to offer the broadest security of hedges to that part of the crop which falls in the hedgeable range of lengths, and enhance accordingly the reliability of futures quotations as price indices. Fortunately enough, by improving the protection offered by hedges to cotton of 1-in. staple and slightly better, it would seem also to encourage the growing of cotton of those lengths, and to improve somewhat the bargaining position of the grower.

If, in time, the production of cotton of 1 in. and longer were sufficiently increased to justify a further change for the same reasons, the further step to 1 in. might then be made without fear of disturbing consequences.

#### CARE IN EFFECTING CHANGES.

After all, the problems of cotton marketing are progressive problems. The measures of yesterday are inadequate for to-day, and those of to-day will probably be inadequate for the problem of to-morrow. Changes and modifications must be expected to take place in the cotton markets as a matter of course. It is generally better to make such changes, as far as possible, in the light of analysis, and to avoid as far as possible the hard consequences of experimentation by the method of trial and error.

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## A Cheap Basis for Cotton.

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*'Extracted from "Commerce Monthly," February, 1929).*

THE cotton-marketing season to date has been characterized by what is commonly called the "cheapest basis" in recent cotton history. On the short growths this fact is interesting as a prime illustration of the interaction of spot and future markets in determining the price of cotton and particularly of the way in which fluctuations of the New York contract due to technical considerations are absorbed. The small premiums for extra lengths making the basis on staples relatively cheaper still than on short cottons seem to be more deep-seated in origin. They reflect more or less fundamental readjustments in both the production and the use of cotton.

Basis is the premium or discount on a particular future contract allowed for individual lots of cotton. Since the general practice of hedging has eliminated much of the risk involved in the fluctuation of cotton prices, interest in the spot trade centres on these premiums or discounts and prices are usually quoted in points on or off a certain future contract. It is in the basis, therefore, that the judgment of the merchant trade affects directly the price received by growers or paid by mills.

The most important elements included in the basis are naturally the differences allowed for grade and length of staple, which vary from season to season with the supply of each type produced and with the peculiarities of mill demand. The basis is also affected, however, by other and less tangible forces such as the temper of producers and distributors or their financial position and by technical conditions in the future markets. It is as a measure of these intangible forces that the movements of the basis on middling  $\frac{7}{8}$  in. cotton are interesting, since in this case the complicating factors of grade and staple differences are absent.

In contrast to the trend a year ago, the basis has declined steadily this season. Since December 1 the average discount on middling  $\frac{7}{8}$  in. in 10 Southern markets has been 111 points off January and March contracts in New York, compared with 11 points off in the same period last year and but 48 off in the large crop season of 1926. The net effect of the low basis is apparent in the fact that the new features in New York have averaged nearly 5 dollars a bale higher than last year during this period, while spot prices in the South have actually averaged 50 cents a bale lower.

In comparison with the two preceding years this very low basis is due in part to the technical position in the New York market.

Owing to the absence of a sufficient stock of cotton in New York, futures here have been at a premium over the South this year, while in both 1927 and 1926 the stock position here made such action unnecessary. Measured by the spread between the New York and New Orleans contracts this premium has amounted to an average of 60 points. As this factor by rights should have no part in determining the general level of cotton prices, a widening of the basis to absorb the premium is a natural consequence.

Eliminating the effect of the technical position in New York, the movement of the basis is very similar to that which occurred in 1926, as is shown by the table below in which the basis is figured on the New Orleans contracts:—

AVERAGE BASIS ON MIDDLING 1<sup>1</sup>/<sub>16</sub>TH SPOT COTTON IN TEN SOUTHERN MARKETS IN POINTS ON OR OFF THE NEAR FUTURES CONTRACTS IN NEW ORLEANS.

				1928	1927	1926	1925
August	..	...	...	+32	-55	+59	+60
October	...	...	...	-19	-45	-46	+26
December	...	...	.	-39	-24	-40	+31
January	...	...	..	-44	-1	-58	+59
June	...	...	...	...	-9	-67	+30

In the fall the basis normally declines a little as crop pressure increases, but the weight of crop receipts this year is insufficient in itself to account for a basis as cheap as in 1926. Total into sight to date is nearly 2 million bales smaller, while the surplus of receipts over takings is fully 27 per cent. below. The difference in pressure due to the crop movement is clearly indicated by the relationship of the near and distant options. In 1926 the far months sold at a substantial premium throughout the marketing period, while the present season has been featured rather by premiums on the near months. In relation to the later contracts, therefore, in which hedges are usually placed, the basis was actually much cheaper in 1926 than at present.

In effect, however, the equivalent of much heavier crop pressure has been supplied by a certain reluctance in the trade to make commitments and by a marked readiness to sell on the part of the producers. As discounts on the far months promised to make it difficult to recover without loss the hedges sold, there was a tendency to balance purchases with sales and to restrict the accumulation of stock that had to be carried. But this hesitation was met by a willingness in the South to come to terms at almost any basis at all, which in ensuing months has moved a lot of cotton. The remaining supply to be received is not far different from the balance in any of the last four years except 1926, and, as in those years, a firmer basis in the second half of the season is not unlikely to develop.

As the basis is usually calculated on New York, which is the broader market, the validity of this conclusion is the more apparent since stock has begun to move to New York and a diminution of the premium of the New York contract over New Orleans might well be expected. From the low of 9,000 bales in September the stock of cotton in New York has increased to 61,000 bales. This movement has been slower than might have been anticipated in view of the premiums prevailing in the fall. It is true, however, that the premiums of delivery months over the South did not quite reach the level necessary to make delivery really profitable. It may be, as well, that the adoption of the new contract specifying Southern delivery has hindered to a certain extent the movement of stock to this port.

The operation of these more general factors emphasizes by exaggeration the low premiums being paid for staple cotton. In Memphis, for instance, the spectacle of middling 1<sup>1</sup>/<sub>16</sub> in. selling a

week or two ago within 40 points of short cotton in New York seems absurd in the light of an average premium of 700 points on New York futures current just three years ago. The basis on staples in fact has been declining since the latter part of the 1924-1925 season, and while there has been some improvement recently it still remains very cheap. On  $1\frac{1}{2}$  in. lengths the recent premiums of 400-500 points on March New York are only half the average paid in the large crop season of 1926 and but 40 per cent. of the average in the preceding year.

In comparison with the low basis prevailing in the second half of last season, the still lower levels reached this year can be accounted for on the score of a decidedly larger supply of staple cotton. In the first place the New Bedford strike last year resulted in some accumulation of stock, the Delta carry-over being estimated at 71,000 bales against a normal of about 40,000 bales. With the advent of the new crop the supply available was further augmented by the larger yield obtained in the Mississippi Delta and in the bottom lands of adjoining States. The Delta is ginning approximately 700,000 bales or 35 per cent. more cotton than last year. In addition there was an increase in the Egyptian acreage of Uppers with an estimated gain in production of fully 300,000 bales. The differential between Egyptian and Delta  $1\frac{3}{16}$  in. declined sharply from a premium of 5 or 6 cents in the latter part of last season to about 2 cents, making competition that much keener.

Although larger than last year, however, the total supply of staples must fall considerably short of the output in both 1925 and 1926, when the Mississippi Valley produced phenomenal crops and the output in Egypt was also slightly larger. Yet the basis on  $1\frac{1}{4}$  in. in Memphis averaged 900 points in those two years, compared with 500 on New York at present, while  $1\frac{3}{16}$  in. brought a premium of 700 points in 1925 and 430 in the following year, against the current basis of 150 points.

The spread of early-maturing weevil-resisting varieties of staple cotton beyond the confines of ordinarily staple-growing territory is partially responsible for the declining trend of the basis. Delfos seed, producing  $1\frac{1}{8}$  in. to  $1\frac{3}{16}$  in. cotton, which has been very generally used in the Delta for a number of years has gradually secured wider distribution in outside areas. A good deal was distributed gratuitously last year at the time of the floods in the bottom lands of neighbouring States, in parts of which it seems to have found general acceptance. This seed is also suited to quite a variety of upland soils and is being tried out in a good many different localities. Larger production of these staples seems to be in accord with a relatively weaker basis on  $1\frac{1}{8}$  in. to  $1\frac{3}{16}$  in. cotton than on the longer varieties.

#### CHANGING MILL REQUIREMENTS.

Of greater importance perhaps are the readjustments of mill requirements that have temporarily or permanently eased the pressure for staple lengths. The fine-goods industry has been under a cloud for several years past owing to the omission of fine cotton from the fashions of the day. Fabrics requiring long-staple cottons, such as lawns, voiles, organdies, fine batistes, have been in poor demand, and production as reported by the Bureau of the

Census has dropped steadily since 1919. The materials that were taken consisted of medium fine fabrics such as percales, piques, and broadcloths, which are somewhat less restricted in staple requirements.

It is natural enough that the call for the fine silky character associated with superfine cottons has not been great in a period that that has witnessed the popularization of silks. But the absence of this demand automatically widens the aggregate supply of raw materials by tapping the vast underlying reservoir of medium staples such as  $1\frac{1}{16}$  in. and even shorter fibre. Twenty-five years ago these yarns were made out of Sea Island cotton until high prices compelled substitution of Egyptian. It was not until a similar rise in prices for Egyptian forced the manufacturers to turn to our own long-staple varieties that Delta cotton was found suitable. With the disappearance of old Delta staple before the weevil and relatively cheaper prices of Egyptian cotton, the trade again concentrated on that type of cotton and the adaptability of domestic varieties had to be learned anew, particularly the potentialities in the use of shorter staples.

The tyre-fabric trade has had a similar experience. Originally dependent upon Sea Island and long Egyptian cottons—because of the strength associated with extra long staple rather than appearance, however—the industry gradually adapted to its use the shorter Egyptian growths and later the domestic staples. The use of the shorter staples was made practical by the replacement of fabric tyres by cords, in which resistance of the fabric yarns to friction is provided by insulation with rubber instead of by inherent tensile strength. Upper Egyptian cotton is still preferred along with domestic types of similar length, but only to the extent of small premiums over the medium growths which recently have been used extensively. Lengths as short as  $1\frac{1}{32}$  in. this year particularly have been in steady demand by tyre mills.

Similarly the demand for staple cotton has been affected in recent years by the introduction of rayon. Although an ally as well as a competitor of fine cotton yarns, there can be no doubt that the increasing use of rayon in the cotton industry has tended to modify the once urgent need for extra length staple. In the United States the cotton industry was slow at first to appreciate the merits of the new fibre as a stimulant to the sale of cotton goods, but its use has recently been increasing very rapidly. Consumption of rayon by the cotton-goods industry is estimated to have doubled since 1925, when, according to the Census of Manufactures, 14 million pounds were used. Recent trade surveys indicate that New Bedford and Connecticut fine-goods mills are in the forefront of this movement. In Lancashire 150,000 looms out of 775,000 in the district were reported not long ago to be devoted chiefly to the weaving of rayon and cotton mixtures. British exports of these mixtures in the first half of 1928 increased 56 per cent. in quantity as compared with the corresponding period in 1927.

There is no question here of a permanent dislocation of the demand for staples, since the material is obviously too valuable a resource to be allowed to go to waste. As the staple varieties of cotton are less prolific than the short growths and are subject to higher charges for picking, ginning and marketing they must com-

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mand a normal premium if their supply is to be maintained. It is too easy to shift a shorter staple production if that proves to be more profitable. But widening the range of types that can be used and adapting other fibres to the needs of the industry does tend to eliminate the very high premiums paid for extra lengths and will no doubt modify the violent fluctuations in premium that in the past have made the prices of staples more unstable than even those of short cotton.

The widening use of shorter staples and new fibres has been an economic necessity growing out of steady expansion in aggregate requirements. Production of tyre fabrics has been increasing very rapidly and, while the output of very fine cotton goods has lagged, it seems likely that the trend of total production included in the fine-goods classification has also been rising.

High premiums in 1925 and 1926 and growing pressure for lower costs in consuming industries stimulated substitution and imparted a downward trend to the basis of staples. The effect has been intensified by the depression last year in the fine-goods industry and in some cases by a deficiency in quality of new crop staple. The low basis, however, seems to have encouraged wide use of staples, so that the slack is gradually being taken up.

T. C. M.

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## PINK BOLL-WORM.

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As is well known, aeroplanes are used in the American Cotton Belt to fight the boll-weevil, but they are now used to discover the flight habits of the pink boll-worm. Aeroplanes equipped with insect traps were recently placed in service in Mexico by the U.S. Government to study the movements of the pink boll-worm moths, which are suspected of emigrating to U.S.A.

The pink boll-worm is one of the most destructive pests of cotton, and has long been combated on the border by the quarantine service of the Federal Horticultural Board. It was felt that the cotton-growing regions of the South-West could be made more secure against the invasion of this and other pests if more were known about the flight from the heavily infested regions.

The traps consist of a sticky fly-paper preparation which holds the moth when it flies against it. The aeroplanes are sent over territory above which the moths are believed to be flying, and by opening the trap specimens are obtained. It was soon found that an unexpectedly large number of insects are present in the upper air, although many of these are insects which possess little or no power of flight and thus are obviously carried involuntarily by air currents.

The fact that wingless insects are taken up by winds proves how difficult it will be to prevent the spread of winged pests.

Age, sex and direction of flight of the insects from infested cotton fields are noted, and the scientists believe these data will enable them to determine the season and direction in which they travel.

## PRELIMINARY COTTON GRADE AND

The grade, staple length (*a*) and tenderability (*b*) of 13,891,857 bales (*c*) of cotton ginned in the United States prior to January 16, 1929; estimated from data obtained from the classification of

Designation	GRADE		STAPLE					
	Total		* $\frac{1}{8}$ and under		1		1	
	bales	%	bales	%	bales	%	bales	%
Crop Total .. ..	13,891,857	100.00	1,927,047	13.87	5,832,860	41.99	3,179,316	22.39
Upland Total .. ..	13,866,431	99.82	1,927,047	13.87	5,832,860	41.99	3,179,316	22.89
Extra White, Total .. ..	397,105	2.86	7,744	0.06	40,930	0.29	55,865	0.40
3—G.M. .. ..	157,270	1.13	2,980	0.02	24,275	0.17	32,044	0.24
4—S.M. .. ..	134,128	0.97	1,491	0.01	9,364	0.07	15,685	0.11
5—M. .. ..	86,479	0.62	1,408	0.01	4,065	0.03	4,009	0.04
6—S.L.M. .. ..	13,804	0.10	774	<i>e</i>	2,026	0.01	1,476	0.01
7—L.M. .. ..	5,424	0.04	1,001	<i>e</i>	1,250	<i>e</i>	851	<i>e</i>
White, Total .. ..	11,802,081	84.96	1,617,820	11.63	4,938,054	35.55	2,791,475	20.09
1—M.F. .. ..	704	<i>e</i>	234	<i>e</i>	186	<i>e</i>	145	<i>e</i>
2—S.G.M. .. ..	42,600	0.31	10,424	0.08	18,242	0.13	8,712	0.06
3—G.M. .. ..	1,637,209	11.79	326,977	2.35	617,251	4.44	380,820	2.74
4—S.M. .. ..	4,913,876	35.37	661,162	4.76	2,069,037	14.89	1,173,493	8.45
5—M. .. ..	3,224,592	23.21	338,362	2.44	1,381,365	9.94	774,196	5.57
6—S.L.M. .. ..	1,333,885	9.60	169,315	1.22	567,180	4.08	303,371	2.18
7—L.M. .. ..	397,930	2.86	71,157	0.51	176,502	1.27	84,161	0.61
*8—S.G.O. .. ..	192,211	1.38	31,751	0.23	84,986	0.61	49,399	0.36
*9—G.O. .. ..	50,074	0.43	8,438	0.06	23,305	0.17	17,178	0.12
Spotted, Total .. ..	1,543,005	11.11	232,306	1.67	821,829	5.92	320,866	2.31
3—G.M. .. ..	156,392	1.13	19,086	0.14	81,143	0.58	39,517	0.28
4—S.M. .. ..	756,847	5.44	92,741	0.67	431,938	3.11	147,447	1.06
5—M. .. ..	425,364	3.06	69,374	0.50	220,206	1.59	86,289	0.62
*6—S.L.M. .. ..	138,634	1.00	39,112	0.28	58,173	0.42	29,180	0.21
*7—L.M. .. ..	66,368	0.48	11,993	0.09	30,309	0.22	18,433	0.13
Yellow-tinged, Total .. ..	30,755	0.22	5,266	0.04	16,986	0.12	5,296	0.04
2—S.G.M. .. ..	407	<i>e</i>	67	<i>e</i>	231	<i>e</i>	77	<i>e</i>
3—G.M. .. ..	4,337	0.03	238	<i>e</i>	3,293	0.02	729	<i>e</i>
4—S.M. .. ..	10,343	0.07	824	<i>e</i>	6,489	0.05	1,687	0.01
*5—M. .. ..	5,189	0.04	1,109	<i>e</i>	2,626	0.02	703	<i>e</i>
*6—S.L.M. .. ..	4,994	0.04	1,778	0.01	1,819	0.01	944	<i>e</i>
*7—L.M. .. ..	5,435	0.04	1,250	<i>e</i>	2,618	0.02	1,156	<i>e</i>
Light-yellow-stained, Total .. ..	1,705	0.01	202	<i>e</i>	897	<i>e</i>	213	<i>e</i>
3—G.M. .. ..	381	<i>e</i>	58	<i>e</i>	208	<i>e</i>	60	<i>e</i>
*4—S.M. .. ..	520	<i>e</i>	39	<i>e</i>	300	<i>e</i>	50	<i>e</i>
*5—M. .. ..	804	<i>e</i>	105	<i>e</i>	389	<i>e</i>	103	<i>e</i>
Yellow-stained, Total .. ..	806	<i>e</i>	53	<i>e</i>	586	<i>e</i>	135	<i>e</i>
3—G.M. .. ..	197	<i>e</i>	9	<i>e</i>	137	<i>e</i>	31	<i>e</i>
*4—S.M. .. ..	294	<i>e</i>	—	—	248	<i>e</i>	35	<i>e</i>
*5—M. .. ..	315	<i>e</i>	44	<i>e</i>	181	<i>e</i>	69	<i>e</i>
Grey, Total .. ..	19,819	0.14	1,321	<i>e</i>	10,671	0.08	2,612	0.02
3—G.M. .. ..	3,505	0.03	193	<i>e</i>	2,542	0.02	542	<i>e</i>
4—S.M. .. ..	12,327	0.09	723	<i>e</i>	6,891	0.05	1,564	0.01
*5—M. .. ..	3,987	0.03	405	<i>e</i>	1,238	<i>e</i>	706	<i>e</i>
Blue-stained, Total .. ..	199	<i>e</i>	—	—	164	<i>e</i>	23	<i>e</i>
*3—G.M. .. ..	132	<i>e</i>	—	—	110	<i>e</i>	12	<i>e</i>
*4—S.M. .. ..	65	<i>e</i>	—	—	54	<i>e</i>	11	<i>e</i>
*5—M. .. ..	12	<i>e</i>	—	—	—	—	—	—
*No grade <i>f</i> .. ..	70,356	0.51	<i>f</i> 62,335	0.45	2,693	0.02	2,331	0.02

*a* According to Official Cotton Standards of the United States.

*b* According to Section 5, U.S. Cotton Futures Act.

*c* According to Report of Bureau of the Census of January 23, 1929.

*d* Percentages computed to the nearest one one-hundredth of one per cent.

*e* Less than one one-hundredth of one per cent.

*f* Includes all bales not otherwise classified above.

*g* Per cent. of total crop.

\* Untenderable.

## STAPLE REPORT FOR THE UNITED STATES

samples representing all of the cotton ginned by certain gins selected to represent the grades and staple lengths of cotton grown in the United States:—

IN INCHES

1 and 1 $\frac{1}{8}$		1 $\frac{1}{8}$ and 1 $\frac{3}{8}$		1 $\frac{3}{8}$ and 1 $\frac{1}{2}$		1 $\frac{1}{2}$ and 1 $\frac{3}{4}$		1 $\frac{3}{4}$ and over	
bales	%	bales	%	bales	%	bales	%	bales	%
1,568,674	11.20	733,498	5.28	439,589	3.16	157,637	1.14	53,236	0.38
1,568,674	11.20	733,498	5.28	439,589	3.16	157,637	1.14	27,810	0.20
108,393	0.78	155,237	1.12	28,761	0.21	96	e	29	e
41,985	0.30	44,916	0.32	10,108	0.07	37	e	25	e
43,508	0.31	55,963	0.40	8,063	0.06	50	e	4	e
18,816	0.14	48,451	0.35	8,830	0.06	—	—	—	—
2,805	0.02	5,096	0.04	1,627	0.01	—	—	—	—
1,279	e	811	e	133	e	9	e	—	—
1,341,984	0.06	540,359	3.89	392,874	2.83	152,586	1.10	26,929	0.19
65	e	63	e	11	e	—	—	—	—
3,793	0.03	627	e	328	e	239	e	235	e
173,054	1.25	61,800	0.44	48,986	0.35	22,755	0.16	5,566	0.04
575,015	4.14	201,054	1.45	152,016	1.09	69,909	0.50	12,190	0.09
384,032	2.76	168,359	1.21	126,646	0.91	44,241	0.32	7,391	0.05
149,750	1.08	80,047	0.58	50,952	0.37	11,902	0.09	1,368	e
32,091	0.23	19,768	0.14	11,110	0.08	2,991	0.02	120	e
17,215	0.12	5,991	0.04	2,339	0.02	483	e	47	e
6,969	0.05	2,620	0.02	486	e	66	e	12	e
112,402	0.81	34,845	0.25	15,845	0.11	4,651	0.03	841	e
12,708	0.09	2,585	0.02	752	e	498	e	103	e
56,845	0.41	17,275	0.12	7,056	0.06	2,540	0.02	545	e
31,242	0.22	11,413	0.08	5,391	0.04	1,267	e	182	e
7,717	0.06	2,762	0.02	1,367	e	312	e	11	e
4,390	0.03	830	e	379	e	34	e	—	—
2,338	0.02	466	e	381	e	22	e	—	—
20	e	—	—	12	e	—	—	—	—
144	e	39	e	34	e	—	—	—	—
861	e	210	e	241	e	22	e	—	—
504	e	164	e	83	e	—	—	—	—
408	e	34	e	11	e	—	—	—	—
401	e	10	e	—	—	—	—	—	—
244	e	85	e	54	e	10	e	—	—
11	e	23	e	11	e	10	e	—	—
77	e	43	e	11	e	—	—	—	—
156	e	19	e	32	e	—	—	—	—
—	—	11	e	11	e	10	e	—	—
—	—	—	—	11	e	—	—	—	—
—	—	11	e	—	—	10	e	—	—
1,840	0.01	1,870	0.01	1,345	e	160	e	—	—
193	e	110	e	113	e	12	e	—	—
1,339	e	1,203	e	560	e	47	e	—	—
308	e	557	e	672	e	101	e	—	—
—	—	—	—	12	e	—	—	—	—
—	—	—	—	—	—	—	—	—	—
—	—	—	—	12	e	—	—	—	—
1,473	0.01	605	e	306	e	102	e	11	e

## STAPLE LENGTHS OF UPLAND COTTON.

Staples in inches	bales	%
Total ..	13,866,431	99.82
$\frac{3}{8}$ and under ..	1,927,047	13.87
$\frac{1}{2}$ ..	5,832,860	41.99
$\frac{3}{4}$ ..	3,179,316	22.89
1 and 1 $\frac{1}{8}$ ..	1,568,674	11.29
1 $\frac{1}{8}$ and 1 $\frac{3}{8}$ ..	733,498	5.28
1 $\frac{3}{8}$ and 1 $\frac{1}{2}$ ..	439,589	3.16
1 $\frac{1}{2}$ and 1 $\frac{3}{4}$ ..	157,637	1.14
1 $\frac{3}{4}$ and over ..	27,810	0.20

## ESTIMATED NUMBER OF BALES TENDERABLE AND UNTENDERABLE ON SECTION 5 CONTRACTS.

	bales	%
Total Upland cotton	13,866,431	99.82
Total tenderable ..	11,549,363	83.14
Tenderable $\frac{3}{8}$ to 1 $\frac{1}{2}$ incl.	10,211,373	73.51
Tenderable over 1 $\frac{1}{2}$	1,337,990	9.63
Total untenderable	2,317,068	16.68

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## Cotton Sold "On Call."

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*Messrs. Bond, McEnany & Co.*, New York, publish, in their Market Report, dated 15th March, the following instructive information referring to the sale of cotton "on call."

"During the past fortnight the exceptional bullishness of the cotton situation, which careful students of the subject long ago perceived to be certain to develop before the end of the season but which for months remained unheeded by the great majority of the trade, has become too apparent to escape the attention either of the trade itself or of intelligent speculative investors. The behaviour of the market since the first notice day for March deliveries in New York has demonstrated anew, in a manner clearly pre-figured by the experience of the trade, both last year and two years ago, how strong a market position for the second half of the season is produced by the practice which American and European spinners have now well-nigh universally adopted of buying their supply of cotton for the period 'on call' instead of at prices fixed while the farmers are still freely marketing their crop. The necessary effects of this practice are, first, that during the months when the farmers must sell, more than half of their total production must be disposed of to merchants who have no other recourse but to sell contracts in the futures markets as hedges against their purchases from the farmers, thereby necessarily driving prices in the futures markets down to a level which will attract speculative buyers, who as a class are governed by the rule that a commodity should be bought for purposes of speculation only when its price is below the cost of production; and, second, that after the farmers have practically completed the marketing of their crop at the ruinously low prices resulting from the operations just described, the domestic and European spinners who have contracted for their second half-year's supply of cotton 'on call' are left with millions of bales of 'call' commitments outstanding, by the terms of which the actual price (or prices) which the spinners must pay for the cotton shipped them must be 'fixed' before the season ends through the repurchase from the speculative investors who originally bought them of the hedge contracts sold by the merchants in the process of securing the cotton which the spinners require. Evidently, this is a condition of things that gives the speculative investors almost complete control over the price (or prices) which the spinners shall actually pay for the cotton their mills consume from approximately the beginning of March until the harvesting and marketing of the new crop start in earnest towards the end of August. How the system works in practice was shown last year, when the price of American cotton advanced about 5½ cents per pound by reason of continuous spinners' price fixing, only moderately affected by speculation for the rise, during the period from early February to early July; while under similar conditions two years ago, despite the bumper crop of that season, an advance of over 13 cents occurred during the nine months from December, 1926, to the beginning of the ensuing September.

There are numerous indications that the difficulties with which the spinners will have to contend in the process of fixing the price of the cotton they have bought 'on call' for the remainder of the present season will be even greater than those which attended the process either last year or the year before. For one thing, there is little doubt that the total quantity of spinners' 'call' commitments on which prices must be fixed during the next five months or so is much larger than was the total quantity of such commitments outstanding in the middle of March, 1928, or on the same date in 1927. Again, the world's total supply of American cotton for the rest of this season is already almost 1,000,000 bales smaller than was the corresponding supply in March, 1928, and not far from 4,000,000 bales smaller than was the supply in March, 1927. In the third place, the rate of world consumption of American cotton, after having been relatively low in the first two months of the present season, has since then increased by leaps and bounds until it is to-day almost certainly higher than it ever was in the past, so that it has become probable that the consumption for the full year will come very close to that of the record year 1926-1927. Fourthly, it is now statistically established that the world's total carry-over of American cotton at the end of the season will not only be much below the average of the past five years, but will also be so small that only a crop of 15,500,000 bales or more this season will make the total supply for 1929-1930 sufficient for the world's needs. Finally, the pitifully low average price which the Southern farmers received for the crop of 1928—a low price chiefly attributable to the spinners' hand-to-mouth buying policy during the marketing season—has had the effect of discouraging efforts on their part to increase the acreage this year and to provide themselves with the fertilizers needed for abundant production. Hence the present outlook is that the farmers will enter the growing season with no expectation of a larger yield than was obtained in 1928-1929, unless Nature should display the exceptional bounty which gave us the bumper crop of 1926-1927.

Obviously, the conditions just described are not such as are conducive to the easy buying by the spinners of the millions of bales of contracts in the futures markets which are needed for the liquidation of their outstanding 'call' commitments. The holders of those contracts are rapidly becoming aware of the strength of their position, and their confidence has recently been fortified by a broadening of speculative interest in the market. In other words, the market, after months of depression, has suddenly assumed the aspect of a sellers' market of the most pronounced kind, and it may reasonably be expected that as the available supply of contracts diminishes by reason of the spinners' necessitous buying the tendency of prices will be to rise to higher and higher levels. In fact, this upward tendency of prices can probably be checked only by unexpectedly favourable developments in connection with the new crop—developments of which there is as yet scant promise in what is known regarding the acreage in prospect, the intended use of fertilizers, the forwardness of preparations for planting, the zeal of the farmers in cultivating for large production, or the boll-weevil outlook."

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## Cotton Acreage in Texas for 1929.

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Mr. Oliver C. McQuage, writing in *Commerce and Finance*, states that the Texas cotton acreage for 1929 will increase for the following reasons:—

1. The per-acre Texas 1928 income is about a dollar above the average of the last five years.
2. Per-Texas cotton farm 1929 income is about \$100 greater than in 1927.
3. The condition of the country banks in Texas is better than it has been for several years. Bankers generally state that the net equity of the farmer is such that he can borrow more money legitimately this year than he could a year ago. By the same token, since the banks have more cash or its equivalent, they are in a position to extend a larger volume of credit without disturbance to their desideratum of liquidity.
4. Cotton brings the greatest dollar return per acre as contrasted to other agricultural crops. The United States Department of Agriculture's figures show that during the last five years in Texas cotton brought an average of \$24 an acre; wheat, \$16.40; corn, \$15; grain sorghums, \$14.85; oats, \$13.35.
5. Variations in interest rates will probably have little or no effect on acreage.
6. Cheap lands in West Texas, where there is a constant breaking-up of new soil for cotton. The costs of production in this area are lower than any territory in the United States and the per-acre yield is higher than any other section in Texas.
7. There is a slight reduction in winter-wheat acreage in Texas. This fact has been somewhat confused because the average layman thinks that the wheat acreage of Texas was increased about 30 per cent. in the Pan-handle. The Government figures do not support this contention. The explanation is that there was heavy abandonment a year ago on account of the weather and that the abandoned acres went into cotton, whereas this year the crop fared very well and the harvested acreage will be greater.
8. Inadvisability of restocking cattle at what is considered the peak price of the cycle.
9. Advice by the United States Department of Agriculture against planting too much corn, oats, feed supply (feed grain, feed stuffs, hay) and barley.
10. Horses and mules on Texas farms about the same as last year.
11. Value of all field crops in Texas about \$40,000,000 greater than that of 1927.
12. Present prices of cotton are such that they do not discourage generous planting.

The writer is of the opinion that the above items point to probably the largest acreage Texas has ever had. He further points out that expansion of cotton acreage in Texas is a normal

procedure in years when the results from the preceding crop and the price at the following planting time are fairly satisfactory. It is only in years like 1920 and 1926 that the expansion is checked.

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## Crop News.

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*The Fossick Bureau* (Memphis) issued the following, dated March 29:—

The crop start is becoming a little late, a matter of no particular significance in so far as final outturn is concerned, but likely to affect sentiment; fertilizer sales are small; the weather has been inviting to early emergence of boll-weevils, which may make the weevil report of U.S. Department of Agriculture, soon to be issued, appear very bullish. Last year the Department omitted several reports because continued cold weather made weevil emergence negligible and in no way indicative of probable survival.

On the other hand, Texas moisture conditions are very good, and have been improved during the last two weeks. We are strongly of the opinion that even as much as average winter precipitation outside of Texas and Western Oklahoma is more harmful than beneficial. An analysis of the records of precipitation as related to cotton production indicates rather conclusively that best results have been obtained—except in Texas and Western Oklahoma—with rather marked deficiency from November to July, about average rainfall in July and somewhat excessive rainfall in August.

Above average winter precipitation in Texas and Western Oklahoma is considered favourable. Texas last year produced a little more than 5,100,000 bales, 500-lb. gross weight equivalents, on less acreage than will probably be planted this year. Yield per acre in Texas last year was but little better than a 10-year average. Preliminary moisture conditions were not as good as they are this year. It is quite possible, within the range of Texas yield per acre during the last 10 years, for Texas to produce 6,000,000 bales or more on an acreage no larger than last year's.

Moderate progress in crop preparations was made during the week. Weather conditions were favourable a little more than half of the week. Planting is well under way over the southern half of Texas and in Florida, and has been started in Louisiana and South-Eastern Georgia. Less alarm is felt as to the possibility of a levee-breaking flood in the Mississippi River, but results will depend upon further rains.

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*The Fossick Bureau*, writing under date April 5, state:—

Vegetation generally, which was backward until a week or ten days ago, has developed wonderfully.

With another week of favourable weather, planting will be getting well under way in the northern half of the Belt. Some scattered plantings have already been made.

Two weeks more of favourable weather, and the new crop will be getting away to at least an average start.

The fly in the ointment is that the weather, while favourable for crop preparation, planting and germination, was also inviting boll-weevil emergence. Prompt germination will give weevil coming out of hibernation something to feed upon against the time that cotton squares begin to form and the weevil is in oviposition.

U.S. Department of Agriculture, Bureau of Entomology, boll-weevil survival report, issued Wednesday, was construed as bearish. The report is based on the number of live weevils found to the ton of moss; future weevil reports, to be issued at intervals of two weeks, probably, for several months will give the percentage of emergence from hibernation to given dates.

Wednesday's report showed smaller survival than last year in South Louisiana, Georgia and Alabama, and rather light survival in Northern Louisiana. However, survival in Southern Louisiana was very heavy, and survival in Texas and South Carolina, at extreme ends of the Belt, was much heavier than last year. At all events, we wish to make a point of what we believe to be sound theory, i.e., that survival and emergence are both of minor importance compared with the rapidity of increase after emergence, and that increase is affected in a most important way by the promptness with which adult weevils find squares to feed upon and by weather conditions directly affecting weevil activity. Hot, dry weather affects weevils adversely; but, under favourable conditions, theoretically at least, according to the Bureau of Entomology, one pair of weevils is capable of a progeny of 12,775,000 in a single season. Also, according to the Bureau of Entomology, comparatively few weevils not fed upon squares copulate, the inference being that the square contains some kind of a sex stimulant.

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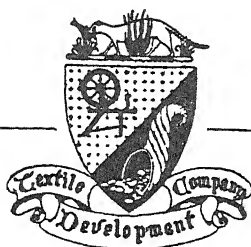
*The Garside Cotton Service* write, under date April 2, as follows:—

The weather this past week was again of a somewhat mixed character, but, in the main, was probably favourable to crop preparations and planting. Extremely high temperatures for the season prevailed through the first part of the week, and dried out the soil sufficiently in those areas east of the Mississippi, where excessive rains had occurred the week previous, to enable farmers to commence ploughing on Tuesday. Towards the end of the week considerable rain fell over the Central Belt and West Texas, and elsewhere there were scattered showers. The rainfall in the semi-arid area of West Texas was especially beneficial, as this section has been too dry; elsewhere the rains were detrimental, since they tended to delay preparations and planting. The delay in preparation is now considerable. Aside from lateness, however, conditions are generally good, particularly in Texas.

The unusually high temperatures for this time which have been prevailing are promoting early weevil emergence. No official data on emergence is available as yet, but all experts anticipate that it will be very heavy. Careful analysis of official records of winter temperatures show that only Oklahoma and Arkansas had sufficient cold weather to kill hibernating weevils. North Texas had some weevil-killing temperatures, but not enough to effect as much control as usual. In the balance of the Belt the winter was extremely mild.

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*Messrs. Clement, Curtis & Co.*, Chicago, issued, on April 2, a cotton-acreage report showing an indicated acreage increase of 4.7 per cent, which would make a total planted of nearly 49,137,000 acres. In 1926, the previous record, the area planted was 48,730,000 acres. The increase this year is mostly in the Central



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### *Members :*

New York Cotton Exchange  
New Orleans Cotton Exchange  
Texas Cotton Association

### *Associate Members :*

Liverpool Cotton Association  
Limited

and Western States, as indicated by the following estimate by States' percentages of last year's plantings: Virginia, 105; North Carolina, 97; South Carolina, 95; Georgia, 99; Alabama, 100; Mississippi, 104; Tennessee, 110; Missouri, 110; Arkansas, 105; Louisiana, 110; Oklahoma, 111; Texas, 106; New Mexico, 125; California, 120.

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The *Fairchild* preliminary report on acreage prospects places the indicated increase at 19 per cent. and the present possibilities for a planted area of about 47,600,000 acres. It says economic conditions in the Cotton Belt are not altogether favourable, particularly east of the Mississippi River. There are substantial areas in Georgia, South Carolina and Alabama being abandoned this year. The weevil for two successive years has played havoc with the crop and the yield per acre has been so small that farmers have been unable to exist. The use of fertilizer will be cut about 20 per cent., according to a weighted average of their reports, and the parts of the Eastern Belt that require the most fertilizer are using the least. The States in their reports expecting the most severe weevil damage are Louisiana, Georgia, South Carolina, North Carolina and Oklahoma.

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*E. A. Pierce & Co.*, New York, report on April 4 as follows:—

We have just issued our first crop report of the season, in which we have made a tentative estimate of 2.3 per cent. increase in acreage, based on correspondents' recent returns. This would point to 48,023,000 acres being planted, the price offered for new crops being the main reason for more acreage. Preparation of the soil is much later this year, the season being from two to six weeks late because of heavy and continuous rains. Very little fertilizer has been used to date, which seems providential because of the great amount of water that has fallen that might otherwise have caused considerable leaching. Many farmers cannot pay cash for fertilizer. Winter weather has been extremely mild, a factor in favour of heavy weevil infestation as the season advances.

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*Messrs Weil Bros.*, of Montgomery, Alabama, in a review of the crop, indicate much progress of the cotton crop, as compared with their previous reports. They state that in the latter half of March preparations were at least ten days late, but the moisture in the ground was a great asset to quicken farming operations. Wherever seed has been put in the ground, so far, it has sprouted much faster than usual.

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*The Cochran Bureau*, Dallas, Tex., issued on April 8 a statement showing that their survey as per April 2 indicates intentions to plant as 48,214,000 acres, which represents a 2.80 per cent. increase over last year's planted acreage, as shown in December Bureau Report. In the past two weeks rapid progress has been made in preparing land for both cotton and feed crops, and in planting corn, which must be planted before cotton. Cotton planting is becoming general in the southern third of the Belt and beginning locally in the middle third, where it will become general by the 15th, unless interrupted by bad weather.

The summary issued by the U.S. Weather Bureau, referring to the week ended April 6, stated :—

Cotton planting has begun northward to South Carolina and locally in Arkansas, while this work was becoming general in Southern Georgia. Seeding advanced rapidly in Louisiana and made very good progress in Southern Texas, where considerable of the early-seeded is up to a good stand, and planting has been started in the central and eastern portions. Good progress was made in the Imperial Valley of California and in South-Western Arizona.

### AMERICAN CONSUMPTION FOR MARCH.

The Bureau of the Census issued on the 13th April the monthly report on the consumption of cotton lint by cotton mills in U.S.A. for March. The consumption in that month amounted to 633,000 bales, against 598,000 bales in the previous month and 581,000 bales in March last year, making 4,682,000 bales consumed so far this season, against 4,782,000 bales to the corresponding date last year. Exports for the month are returned at 556,000 bales, exclusive of linters, against 613,000 bales for the previous month and 596,000 bales last year. Stocks at mills amount to 1,731,000 bales, against 1,747,000 bales a month ago and 1,593,000 bales a year ago, and in outside warehouses to 3,177,000 bales, against 3,876,000 bales and 3,511,000 bales. Spindles active during the month totalled 31,104,000, against 31,008,000 in February and 31,413,000 in March last year.

Consumption of linters in March was 77,000 bales, against 68,000 bales the previous month and 61,000 bales last year; stocks at mills were 229,000 bales, against 222,000 bales and 220,000 bales, and in outside warehouses 81,000 bales, against 86,000 bales and 65,000 bales.

### DATES OF COTTON GRADE AND STAPLE REPORTS.

The following dates for the issuance of reports on the grade and staple of cotton ginned during the coming season have been announced by the Bureau of Agricultural Economics, United States Department of Agriculture :—

	Cotton Ginned prior to
October 25, 1929, 1 p.m.....	October 1, 1929
November 29, 1929, 1 p.m.....	November 1, 1929
February 14, 1930, 1 p.m.....	January 16, 1930
January 3, 1930, 1 p.m.....	December 1, 1929
April 18, 1930, 1 p.m.....	

for the total crop as it will be reported by the Bureau of the Census on or about March 20, 1930.

The date on which the report will be made of the grades and staples of cotton carried over on August 1, 1929, will be announced later.

## WEIGHT OF COTTON BALES.

Mr. H. G. Hester, secretary of the New Orleans Cotton Exchange, reports that the average weights of cotton handled at ports and overland from August 1 to close March were as follows:—

	1929	1928
	Number in bales	Average weights lbs.
Texas .. .. .	6,196,607	533.76
Louisiana . . . .	1,429,350	526.44
Alabama, etc . . . .	254,781	523.70
Georgia . . . . .	336,079	508.66
South Carolina . . . .	158,219	496
North Carolina . . . .	121,151	486
Virginia . . . . .	216,082	500
*Tennessee, etc . . . .	1,218,755	519.91
Total, eight months . . . .	9,931,024	527.98
Aug., Sept., Oct., Nov., Dec., Jan. and Feb.	9,339,915	528.30

\* Average weights based on returns from Memphis and St. Louis. Memphis average 524.73 against 512.76 last year; St. Louis 500 against 500.

## MARCH FERTILIZER TAG SALES.

The National Fertilizer Association reports the following details of fertilizer tag sales for March in short tons:—

Since sales in March, 1928, were rather large, the recovery for March this year from the large declines for January and February, in comparison with a year ago, is reassuring. March sales seem to point toward a further recovery during April.

	Per cent. of 1928	March 1929	Per cent. of 1928	December-March 1928-29
Grand total ..	97.5	2,155,726	2,210,850	86.8
Total, South ..	97.1	2,121,788	2,185,613	85.8
Virginia† ..	108.2	80,175	74,080	91.2
North Carolina ..	85.8	489,123	570,181	79.9
South Carolina† ..	98.2	375,015	381,434	80.3
Georgia ..	101.6	436,136	429,253	85.3
Florida‡ ..	97.4	39,880	40,948	102.0
Alabama ..	89.0	316,850	356,000	76.1
Mississippi ..	86.4	131,452	152,239	82.2
Tennessee† ..	145.1	41,337	28,487	102.2
Mexico ..	212.0	8,542	4,030	117.5
Arkansas   ..	124.0	61,059	49,250	119.0
Louisiana† ..	159.4	66,519	41,733	118.6
Texas† ..	125.6	72,600	57,800	123.6
Oklahoma ..	1,741.6	3,100	178	100.1
Indiana§ ..	134.5	33,938	25,237	145.7

NOTE.—Monthly records of sales of fertilizer tags are kept by State control officials and are usually slightly larger or smaller than the actual sales of fertilizer.

† Cottonseed meal sold as fertilizer included.

‡ Includes 100 tons of cottonseed meal sold as fertilizer in Florida for March and 500 tons for the four months.

|| Includes 2,000 tons of cottonseed meal sold for March and 9,008 tons for the four months, but no separation is available of the amount of meal used as fertilizer from that used as feed.

§ Not included in Southern States.

## COTTON-GROWING DEMONSTRATIONS.

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Mr. David R. Coker, a well-known cotton-seed breeder of Harts-ville, South Carolina, is to finance, at a cost of \$20,000 to \$30,000, a demonstration of cotton growing in Darlington County. Mr. Coker will lease from 100 farmers five-acre tracts at \$25 each, and the farmer will grow cotton on the area as directed by Mr. Coker and the supervisors whom he will employ. Each tract will be entered in the State-wide "More and Better Cotton to the Acre Contest" conducted by the Agricultural Extension Service. Each of the participating farmers will deliver to Mr. Coker half of the cotton and seed that his tract yields. Prizes totalling \$2,000 will be awarded.

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## Indicated Weevil Activity for the Year 1929.

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*Messrs. Munds & Winslow*, New York, under date March 28, publish the following interesting forecast of weevil infestation for 1929. The forecast was prepared by Dr. George D. Smith, entomologist, of Madison, Florida. It should be emphasized that his comment relates chiefly to the extent of early infestation, while the ultimate damage, as is well known, will be governed by the character of spring and summer weather. Dr. Smith's forecast follows:—

The abnormally high minimum winter temperatures experienced over more than three-fourths of the Cotton Belt during the 1928-29 season indicate heavy boll-weevil damage to the 1929 cotton crop. In fact, it may be said that cotton growers are facing the worst weevil year since the period 1921 to 1923.

It is recognized by entomologists that weevil damage to the American cotton crop is dependent upon several different climatic factors, which may be listed as follows:—

- (1) Fall breeding conditions.
- (2) Date of killing frosts in the fall.
- (3) Minimum winter temperatures.
- (4) Nature of emergence weather during the spring months.
- (5) Amount of summer rainfall.

Fall breeding conditions determine the weevil density in the cotton fields at the date of killing frost. Under very dry fall weather conditions the cotton plant develops a minimum crop of blossoms, buds or squares in which the weevil deposits its eggs, thus reducing the number of adult weevils present in the fields at the date of killing frost. On the other hand, excessive moisture during the fall months stimulates square

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development, which results in a much larger number of weevils being reared to enter hibernation.

The date of killing frost which destroys the green cotton plant and deprives the weevil of food is also a most important factor in determining the number of weevils that enter hibernation. If frost comes unusually early, and the weevils are forced to go without green cotton as food for a period of 20 or 30 days before winter weather forces them into a state of permanent hibernation, a heavy mortality occurs from starvation.

Minimum winter temperatures 10° F. above zero and lower are usually considered as effective killing temperatures. However, in regions of a mountainous or hilly nature, such as are to be found in South-Eastern Oklahoma, unusually favourable hibernating conditions are afforded the weevil, and it has been observed that enough weevils survive the winter to cause serious damage in this section, even with temperatures well down around the zero mark.

The character of the weather during the main emergence period from March to June affects the probable weevil damage. A definite amount of moisture along with hot weather is necessary to force the weevils from winter quarters. During periods of prolonged droughts weevils are held back in winter quarters until rain comes.

It frequently happens that a small winter weevil survival is held back well into June, and then forced out of winter quarters and into the cotton fields under the most favourable conditions for development, thus greatly increasing the amount of damage to the cotton crop over that indicated by the effective winter temperatures experienced.

#### FORECAST OF DAMAGE BY STATES.

*Texas*—Weevil damage to the Texas crop will, under normal seasonal conditions, be much greater than was experienced during the 1928 season. No effective killing temperatures were experienced over the weevil-infested area, and a normal weevil density entered winter quarters during the fall of 1928. Heavy damage will occur in the Beeville-Cuero and Dallas-Greenville area with locally heavy damage in other portions of the infested area.

*Oklahoma*—The entire south-eastern portion of Oklahoma will experience weevil damage, which may become very heavy should the early summer months be abnormally wet. The minimum temperatures during the 1928-29 season were about as low as during the 1927-28 season, and about the same weevil survival is indicated. It should be noted in the case of Oklahoma, however, that killing frost did not occur until late in the fall, thus permitting the weevils to have green cotton as food right up to the time of entrance into permanent hibernation. Normally early frosts kill the cotton in Oklahoma and force the weevils to go without food for several weeks before winter weather forces them into a state of permanent hibernation, which causes a heavy mortality among the adult weevils from starvation.

The main weevil-infested area lies south and eastward of a line extending from Waurika by way of Paul's Valley to Fort Smith, Ark.

*Louisiana*—No effective winter temperatures were experienced in Louisiana, and it may be said that the entire cotton crop of the State is seriously threatened by weevil during the coming season. Fall breeding conditions were favourable, and a normal to abnormally large number of weevils entered winter quarters.

*Arkansas*—Minimum winter temperatures were not sufficient for weevil control south of a line extending from Fort Smith by Little Rock to

Memphis. Heavy weevil damage will undoubtedly occur along the river and creek bottom lands in this area.

*Tennessee*—For the first time the writer calls attention to the prediction that Tennessee will experience locally heavy initial weevil infestations. Winter temperatures were not sufficiently low to cause serious mortality among the over-wintering weevils.

*Mississippi*—Mississippi, like Louisiana, did not experience winter temperatures sufficiently low to benefit by any special winter mortality among the weevils in hibernation. The weevil is normally controlled in the Delta or northern half of the State by winter temperatures with zero temperatures usually reported in the northern tier of counties. However, during 1928-29 winter no temperature control is indicated. Combined with the total absence of winter temperature control may be mentioned the fact that very heavy weevil densities were present in the fields to enter winter quarters.

*Alabama*—The State of Alabama experienced no winter control of the boll-weevil of any consequence, and moderate to heavy damage may be expected over the entire weevil-infested area.

*Georgia*—Georgia had no winter temperatures low enough for weevil control. Atlanta, which normally experiences zero weather during the winter months, reports a minimum of 20° F. above zero. Combined with the absence of effective killing temperatures may be mentioned the fact that rains during August and September caused a very favourable condition for weevil development, and no doubt the State had more weevils enter hibernation than for a number of years. The weevil damage will be unusually heavy in the infested section under normal seasonal conditions.

*South Carolina*—Winter temperatures were abnormally high in South Carolina, and heavy weevil damage is to be expected during the 1929 season. A very heavy weevil density entered winter quarters under favourable conditions for a large winter survival.

*North Carolina*—Like Tennessee, North Carolina usually experiences effective winter temperatures, and is seldom bothered with serious weevil damage. However, mild temperatures during the 1928-29 season indicate very little mortality among the over-wintering weevils, and heavy initial infestations will undoubtedly be reported from the infested area.

#### SUMMARY.

Summarizing data to date on the 1929 weevil outlook, it may be said that from normal to abnormally heavy weevil densities were reared to enter winter quarters during the fall of 1928. This was particularly true in the eastern half of the Cotton Belt owing to heavy rainfall during August and September, which caused the cotton plants to put on new square growth, thus affording favourable breeding conditions for weevils during the fall months.

The killing frost date or time of entrance into hibernation was most favourable to adult weevils. Green cotton for food was present in the fields right up to the time of entrance into hibernation.

Attention is called to the fact that cotton growers are facing a most disastrous weevil year, *unless the summer should be abnormally dry. If normal rainfall or a wet summer is experienced weevil damage will be much heavier than for several years.*

Temperatures of 20° F. above zero at Atlanta, Ga., as compared with 2° F. above zero last season; 3° above zero last year for Holly Springs, Miss., compared with 15° F. above zero for the 1928-29 season, and 17° F. above zero for Little Rock, Ark., compared with six above zero last season, show in striking contrast the unusually mild winter weather for the 1928-1929 season.

Combined with heavy initial weevil infestation may be mentioned the fact that weevil control by the use of poison is but little practised, and in most cases the dusting machinery has deteriorated so much as to be of little value. General replacement of equipment will be necessary. Such conditions, viewed from a scientific standpoint, would indicate a most devastating result.

## BOLL-WEEVIL SURVIVAL.

The following is a tabular statement covering the records of weevils entering hibernation in moss and survivals for the last four years. All examinations, with the exception of those in Texas, were made from March 4 to 20. Those in Texas were made on February 28:—

### HIBERNATION AND SURVIVAL OF BOLL-WEEVILS PER TON OF MOSS\*.

		1925-26	1926-27	1927-28	1928-29
North Louisiana---	Entering hibernation..	330	242	†18	202
	Survival .. ..	0	4	1.0	3.8
	Per cent survival ..	0	1.6	5.5	1.8
South Louisiana.	Entering hibernation.	1,581	192	357	669
	Survival .. ..	243	70	‡365.1	261.8
	Per cent. survival ..	15.3	36.4	100	39
Georgia .. ..	Entering hibernation..	39	359	220	218
	Survival .. ..	2	No rec.	88.7	38.7
	Per cent. survival ..	5.1	—	40.3	17.7
South Carolina ..	Entering hibernation ..	52	48	1,525	768
	Survival .. ..	7	0	21.1	70.7
	Per cent survival ..	13.4	0	1.3	9.2
Alabama .. ..	Entering hibernation..	—	—	148	55
	Survival .. ..	—	—	45.2	10.8
	Per cent. survival ..	—	—	30.5	19.6
Texas .. ..	Entering hibernation ..	—	—	No rec.	No rec.
	Survival .. ..	—	—	74.5	101.7
	Per cent survival ..	—	—	—	—

\* Spanish moss is a favourite hibernating place of the boll-weevil, and for a number of years this material has been studied as an easily available means of indicating the numbers of weevils entering hibernation, as compared with the numbers which survive the winter. This moss is collected in December under conditions favourable to hibernation at different places, and the number of weevils, on a per ton basis, is determined by careful examinations. The hibernation determination is made from collections and counts in December, and to determine survival moss is collected at the same points between February 15 and March 15 (for Texas, Jan. 15 to Feb. 25), and similar examinations determine the winter survival.

† Reduction in weevils accounted for by the flood of 1927.

‡ A different collection of moss is concerned in the survival figures, but these figures indicate approximately 100 per cent survival for the winter of 1927-28 in Southern Louisiana.

## UNITED STATES EXPORTS OF LINT COTTON, EXCLUDING LINTERS.

Country of destination	1927		1928	
	bales	Value thousands	bales	Value thousands
Belgium .. ..	253,973	\$23,425	202,723	\$22,169
France .. ..	918,098	92,754	819,137	90,836
Germany .. ..	2,452,472	226,048	2,037,872	217,891
Italy .. ..	666,308	60,550	737,505	78,836
Netherlands ..	125,097	12,155	162,388	18,209
Soviet Russia in Europe ..	474,900	39,225	429,393	44,537
Spain .. ..	312,833	29,702	314,264	34,417
Sweden .. ..	58,082	5,252	55,084	5,828
United Kingdom ..	1,648,175	138,936	1,997,395	211,399
Other Europe .. ..	95,864	9,595	92,587	10,346
Canada .. ..	244,369	20,363	234,103	24,219
British India .. ..	261,847	17,764	63,780	6,684
China, Hong Kong & Kwantung	242,705	19,077	170,067	17,713
Japan .. ..	1,437,453	122,922	1,225,473	129,272
Other countries .. ..	6,570	550	4,648	493
Total .. ..	9,198,746	\$818,318	8,546,419	\$912,849

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## Cotton Growing in Upper Egypt.

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*By C. H. BROWN, Botanical Section, Egyptian Ministry of Agriculture.*

The following article is reprinted from a recent issue of the *Commercial* :—

“ The southern boundary of Egypt is at Wadi-Halfa, but cultivation virtually ceases at Assuan, 450 miles south of Cairo. The cotton plant is well suited to Lower Egypt, but in Upper Egypt it luxuriates. The four cantars per acre of the last few years in Egypt has been made up roughly by the two-thirds of the area in the Delta producing three and a half cantars per acre and the one-third in Upper Egypt producing five cantars.

The advantages of Upper Egypt are many, the principal ones being: (1) Less boll-worm attack. The boll-worms flourish best with comparatively low temperatures and high humidity. These conditions are found during the ripening of the second pick in the Delta. As a consequence, late bolls in the Delta are largely destroyed, and the cotton which manages to open is stained and lowered in grade. In Upper Egypt, north, say, of Beni-Souef, boll-worm is still important, but south of Beni-Souef it is not nearly so much feared, and south of Assiut it is almost negligible.

(2) A longer ripening season. Cotton-sowing is commenced roughly in the first and second halves of February in the south and north respectively in Upper Egypt, and the first and second halves of March similarly in the Delta. The beginning of picking is similarly spaced during August in Upper Egypt and during September in Lower Egypt. This gives equal growing seasons. After the commencement of picking the advantage lies with Upper Egypt, for the reason that at any one date temperatures are higher in Upper Egypt, and that in point of time the picking is there commenced a month earlier. Late bolls thus reach maturity in Upper Egypt which in the Delta would probably be unable to open because of low temperature, and would in any case be boll-worm attacked. Picking is thus spread over a longer period, and higher total yields are obtained.

(3) The fellah is very prone to overwater cotton, and overwatering, resulting in excessive vegetative growth, is very much more difficult in the higher temperatures and lower humidity of Upper Egypt.

(4) Nitrogenous manuring under perennial irrigation has to be done with the greatest care for fear of deleterious soil effects, whereas in the basin lands heavy doses of nitrogenous manure can be given with impunity, as the flooding washes out the residual alkalis.

(5) The hotter conditions of Upper Egypt appear to check the excessive vegetative growth that follows heavy nitrogenous manuring in the Delta, this factor again tending to make each manure increment more profitable in Upper Egypt.

The reason why the Upper Egyptian acreage is still small is the

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difficulty of water supply. Cotton needs summer water, and the basin system of irrigation in Upper Egypt does not provide this. The whole of Lower Egypt and Upper Egypt north of Deirout has been converted by canalization from the basin system to perennial irrigation, which allows cotton to be grown. South of this perennial irrigation cotton can only be grown by the sinking of wells with pumps to provide summer water. The perennial irrigation areas of Upper Egypt have for many years grown as large a proportion of their area with cotton as the Delta. The steady increase may be interpreted as a growing realization by the Upper Egyptian fellahin that cotton has such great natural advantages there that it pays them to install pumps. This realization is gradually spreading farther south, and is at present most active in the Assiut-Sohag district. The centre of gravity of the Upper Egyptian cotton area is thus steadily being pushed south. Early in the century it was between Beni-Souef and Maghagha, and is now steadily progressing south towards Minia, the movement having been greatly accelerated in recent years. It may safely be predicted for the future that this centre of gravity will continue to progress from Minia towards Assiut.

It is usually contemplated that most of these areas will be converted to perennial irrigation when the increased summer water supply promised by the building of the Gebel Aulia dam and the heightening of the Assuan dam becomes available. This would, of course, result in a continued rapid increase in the cotton areas in the present basin lands. It is not, however, quite certain that such a conversion would be really desirable. Basin irrigation appears to have two main advantages, the annual washing of the soil alluded to above, which allows the much freer use of chemical manures, and the absence of any water tanks, which has been accused of responsibility in decreasing the yield farther north. An alternative suggestion is, therefore, to leave the present basin lands untouched, if possible providing cheap power, perhaps by an electric-power plant on the Assuan dam, to encourage the further installation of pumps.

The pros and cons of these alternatives will, of course, be thoroughly discussed before any move is made. In either case, or even with the continuance of the present rate of progress in these areas, a cotton acreage in Upper Egypt which approaches or even equals the present Delta area seems almost certain in the future. This may easily mean that, with the large yields obtainable in Upper Egypt, a cotton crop equal to the present total crop of Egypt may at a not very distant date be grown south of Cairo.

The economics of such a large Egyptian cotton crop naturally demand careful consideration, especially in view of the present policy of acreage restriction. Probably the size of the total world crop of cotton may safely be left to the ordinary laws of supply and demand. The main need is for greater year-to-year stability in the price, the present instability being due to the predominating influence of the American crop. In so far as the projected large crop of Uppers will tend to lessen this, it will be all to the good of everyone concerned.

A simple calculation of the relative money value per acre of the cotton crop in the principal countries gives the following result in

pence per acre. The yield-averages taken for America and India are rather on the optimistic side. Approximately present prices are taken :—

					Per Acre.
U.S.A.	..	..	180 lbs. at 10d.	...	= 1,800d.
India	...	..	100 lbs. at 9d.	.	= 900d.
Lower Egypt	.	.	350 lbs. at 17d.	...	= 5,950d.
Upper Egypt	.	.	500 lbs. at 12d.	...	= 6,000d.
Sudan	..	...	400 lbs. at 17d.	...	= 6,800d.

As between Upper and Lower Egypt, the table shows a slight advantage in profitability of Upper Egyptian cotton. Any future increase in the yield per acre appears likely to profit both fairly equally; a factor, however, which may turn the scales still more in favour of Upper Egypt is the probable future relative depression of the price for long-staple cottons. The increasing Sakel area of the Sudan and the growth of longer-stapled cottons in Upper Egypt appear to make such a depression almost inevitable.

## GOVERNMENT CROP REPORT.

The Ministry of Agriculture published the following report concerning the state of the crop during the month of March :—

“ At the beginning of the month the temperature was not very favourable for cultivation and germination, but later on it improved in spite of the bad weather, which prevailed during some time. Sowing can be considered as terminated by now on about one-half of the land reserved for cotton cultivation in the North of the Delta, and on about three-quarters of that land in the other provinces. Thinning, resowing, weeding and irrigation continue in the early-sown fields. Resowing to the extent of about 10 per cent. had to be effected in the Northern Provinces, but it does not exceed 6 per cent. in the other parts of the country. Attacks of ‘ aphis ’ have been reported from some restricted areas of the Provinces of Assiout, Guirgneh, Keneh and Assouan; the ‘ sore-shin ’ has made its appearance in the district of Guirgneh and the ‘ cut-worm ’ in the district of Assouan.”

## Meeting the Competition of Artificial Silk.

*By Dr. W. L. BALLS and C. H. BROWN.*

*(Extracted from “ The Commercial,” Manchester.)*

Consideration of the future demand for any commodity must ultimately turn upon the probable price at which that commodity can be produced, as compared with the probable prices of substitutes for it, and this is particularly true of Egyptian cotton. As a cotton of special quality, commanding a premium on American, demand for it is not subject to the fluctuations in the general world demand for cotton, the brunt of these being borne by

the much larger American crop. Egyptian cotton has two competitors—other long-staple cottons and artificial silk. Long-staple cottons are likely to be the less important in the future; long-staple cotton growing in the United States is not very flourishing, and the quantities of cotton from other countries of a staple able to compete with Egyptian are limited, the most important being the crop of Sudan Sakel. Even this, however, shows no signs of being produced in the future in any greater bulk than 20 per cent. of the portion of the Egyptian crop of similar staple, and it is not, therefore, relatively serious as a competitive factor.

From artificial silk the competition will be more serious. The principal producers of this commodity are at present selling at controlled prices, and the incidence of their competition with Egyptian cotton naturally varies with the price of cotton. It is, therefore, necessary to take a series of years to get a broad view of this competition. The clue is given by the fact that the controlled prices of both viscose and acetate yarns are subjected to repeated cuts, but are never increased. In the long run the severity of their competition must inevitably increase. The relative incidence of this competition on Egyptian and American cotton is a little difficult to judge. The competition has affected the Egyptian staple first, the two being more similar in both quantity of production and staple of the finished product of fine fabrics.

Large quantities of fabric produced from artificial silk would be needed to depress the price of American cotton, and these quantities are not at present available. In time, however, they may be, and the boot may then be on the other leg, the artificial silk competition depressing general world cotton prices, but the longer-staple types being in a relatively favourable position because of their suitability for use in mixed fabrics. There is as yet no indication that the monopoly of Egyptian cotton in strong fabrics is in any serious danger. Even in mixed fabrics, however, the proportion of the two constituents can be varied, and would be varied according to the relative price of each, so that from whatever direction the question is studied the problem of future demand seems to turn on the question: Can the price of Egyptian cotton be reduced?

Present indications are that it can, and the outlook for Egyptian cotton is therefore hopeful. Costs of production of an agricultural product are obviously a quotient of the necessary expenses and the yield per acre obtainable. In the expenses of Egyptian cotton growing, labour and land costs predominate. Labour expenses are unlikely to fall, and hardly anyone would wish to see them fall. The only direction in which the fellah's wages could or should move is upward. The large ratio of picking costs to total labour costs offers little hope even with the introduction of cultivation machinery. Land costs are certainly very high, and clearly afford room for reduction. Whether reduction will take place within any reasonable period of time, however, appears to be doubtful. The population is still increasing. The only other expenses of importance that appear to offer scope for reduction are middlemen's costs. Here again, although some progress may be made, it will be slow and difficult in a country with a largely uneducated population.

For bringing about marked reduction of costs the increase of yield per acre and of quality appears to offer more immediate hope.

Much is at the moment being achieved on both these lines. The Egyptian crop in recent years has been divided into two main groups—the Uppers crop, grown on high-yielding land and producing a staple averaging roughly 25 per cent. premium on American, and the Sakel crop, grown on low-yielding land and bringing about 75 per cent. premium. Intermediate staples have been grown in small quantities only. New varieties on the high-yielding land, bringing a relatively higher premium than the old Uppers, and high-yielding varieties of good staple are already being propagated, and should put both these groups in an extremely strong competitive position.

The present extension of the Uppers area, which in the present season has produced the extremely low premiums of 17 and 18 per cent., has shown that the quantity of Uppers that can be absorbed at this attractive price has no obvious limit. Sakels are at the moment bringing 80 per cent. premium. What might the demand be at a premium of 50 per cent.—a perfectly possible one, considering that the yield of American cotton shows no signs of reaching an average of 200 lbs. an acre, while that of the new Egyptian strains will be a minimum of 450–500 lbs.? Demand is likely to be stimulated also by the greater range of staples which Egypt will probably offer in the future. A total of perhaps five varieties, averaging a crop of 2,000,000 cantars each, and all at attractive prices, which is the present objective of Egypt, should be absorbed by the world with the greatest ease.

### EGYPTIAN COTTON CONSUMED IN THE U.S.A.

Month	Equivalent 500-lb. bales								
	1920-21	1921-22	1922-23	1923-24	1924-25	1925-26	1926-27	1927-28	1928-29
August	26,682	20,263	16,707	17,819	11,268	17,805	17,162	22,443	18,594
September	19,581	15,896	13,209	15,740	13,527	17,939	22,884	19,639	16,138
October	12,867	10,891	15,476	20,846	13,979	17,520	20,812	19,345	19,592
November	10,236	22,291	20,439	19,880	19,129	12,559	16,393	20,507	17,632
December	7,219	20,779	21,344	18,085	16,491	16,002	17,015	18,584	17,849
January	7,180	20,777	25,947	23,443	18,662	18,843	17,365	20,064	22,176
February	5,600	19,908	25,923	23,040	17,898	19,205	17,250	20,435	19,479
March	9,705	20,390	27,410	20,998	17,965	21,770	21,773	17,018	—
April	12,198	16,748	27,145	21,168	16,532	18,197	19,527	16,448	—
May	14,765	17,253	29,165	15,846	16,893	17,043	22,013	14,923	—
June	15,446	17,205	22,498	13,894	17,824	15,093	26,069	13,949	—
July	15,717	15,929	17,070	12,892	17,865	14,591	21,354	13,451	—
Total	157,196	218,330	262,333	233,651	197,833	206,126	339,617	216,806	—

### THE EGYPTIAN GINNINGS.

On April 15 it was announced at Cairo that the ginnings of the Egyptian cotton crop from the beginning of the season until the end of March were 7,475,500 cantars, including 2,270,795 cantars of Sakellaridis. The following table shows the ginnings reported at specified dates during the season, the last line showing the official crop forecast of December 3 last:—

	All varieties Cantars	Sakellaridis. Cantars
Ginned to March 31	7,475,500	2,270,795
Ginned to February 29	7,079,598	2,149,249
Ginned to January 31	6,591,681	1,991,480
Ginned to December 31	5,909,921	1,773,345
Estimated crop	7,195,845	2,342,315

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It will be seen that the ginning report definitely establishes the fact that the Government forecast considerably underestimated the total production of cotton, though it appears that the estimate for the outturn of Sakellaridis is likely to prove rather above the mark.

---

## Market Reports.

---

*Messrs. Alexandria Commercial Co. (S.A.),* Alexandria, in their market report of April 4, write as follows:—

*Sakel Futures:* On account of the Easter holidays, the market was only open for three days during the past week. The three sessions were rather quiet, and prices sagged a little under the pressure of liquidation of long positions and some speculative sales. The trade has been more or less entirely out of the market on account of the absence of any interest on the part of spinners, and the few orders that were placed by the latter were "on call" based on November.

A new estimate of the Sudan Sakel crop has just been issued by the Sudan Government, giving as the probable production 601,700 cantars. This figure we consider somewhat on the small side, and it seems to us that 650,000 cantars will be nearer the reality.

We give below the statistical position of Sakel in Egypt at the end of March:—

Stock Alexandria...	...	1,260,000 cantars	(including 300,000 cantars held by the Government)
Stock Up-country (about)		250,000 cantars	
Total ...	...	<u>1,510,000</u>	cantars

At the same date last year the stock of Sakel in Egypt was about 1,680,000 cantars.

We would add, for purposes of comparison, that exports for the period April to August last year amounted to 1,100,000 cantars.

The above figures indicate a rather strong position, but it must not be overlooked that the Sudan Sakel crop, which, as mentioned above, will amount to about 650,000 cantars, against 475,000 cantars last year, is available almost in its entirety, as it has only just made its appearance on the Liverpool market.

Our opinion about the market is that a distinct revival in the demand from the trade will be necessary to maintain prices at the present levels, but that a continuance of the present lack of interest on the part of spinners will inevitably lead to lower quotations.

The difference between Sakel and Uppers (May/June) is 1,334 points this week, against 1,310 points last week, and 1,396 points last year.

*Uppers Futures:* This market during the week has evinced a firmer tone than that for Sakel, and the difference between the two varieties shrank about half a dollar. This comparative firmness is due to some commercial buying and to covering by shorts.

The question of the imposition of a prohibitive tariff on cotton

imported into the United States has continued to be the subject of much excited discussion, and the Egyptian Government has issued a statement to the effect that the matter has its full attention. News from America is contradictory, some sources stating that the passing of the law is doubtful; others that a tariff of some sort will be imposed.

As was naturally to be expected, the projected law has had the effect of stiffening the near positions and weakening those of new crop, and this tendency will very likely continue until more definite details about the law are known.

We give below the statistical position of Ashmouni and Zagora in Egypt at the end of March:—

Stock Alexandria	...	..	1,360,000	cantars
Stock Up-country (about)		.	250,000	cantars
Total	...	.	<u>1,610,000</u>	<u>cantars.</u>

On the same date last year the stock of Ashmouni and Zagora in Egypt was about 1,560,000 cantars.

For the purposes of comparison, we would add that exports for the period April to August last year amounted to 1,260,000 cantars.

The difference between Uppers and New York (June/May) this week is 342 points, against 321 points last week and 842 points last year.

*Messrs. P. Augustino & Co.*, Alexandria, write under date April 11:—

*Sakels*: During the week under review the market has been somewhat narrow, being easily influenced by relatively small transactions.

The trade bought moderately, and it is reported that some fair c.i.f. sales have been effected recently, chiefly *Sakels*. Professionals more or less continued to work on the bear side, but at the lower level the market has shown a good amount of resistance, prices recovering quickly previous losses.

Some decline has been caused to-day by speculators giving an undue bearish interpretation to a Reuter cable stating that the introduction of a tax on the importation of cotton into the United States of America is not likely. From other sources we hear that no decision is probable before late in the summer months.

It is believed that local spot interests who are in favour of *Sakels* have recently at the decline continued to buy quietly some lines of May delivery, and it looks as if they will insist on the actual delivery of the cotton bought when the delivery becomes due.

Receipts during the week have shown some increase, but this is simply due to the fact that all cotton in the Interior must be ginned before May 1, and has no other significance.

*Uppers*: Most of the business consisted of transfers from near to distant positions. As an early decision on the question of a tax on cotton in America is not likely, distant positions have been more favoured. On the whole, prices have not fluctuated much.

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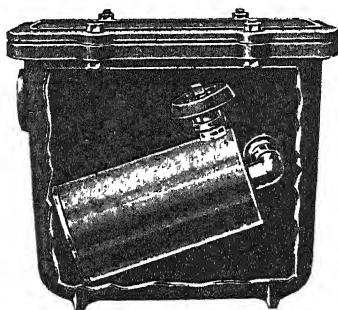
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*Messrs. Reinhart & Co., Alexandria, Egypt, report under date April 12 as follows:—*

The tendency of our market remained very uncertain during the week under review. The projected taxation of Egyptian cotton, which will be submitted to Congress at Washington, is still the main subject of all discussions, but the interested parties are commenting differently on the eventual effects of the new Bill and on the date it will enter into force.

In prevision of an immediate application of the duty, important purchases of spot cotton and of futures for near deliveries are taking place, which are partly hedged in New Crop.

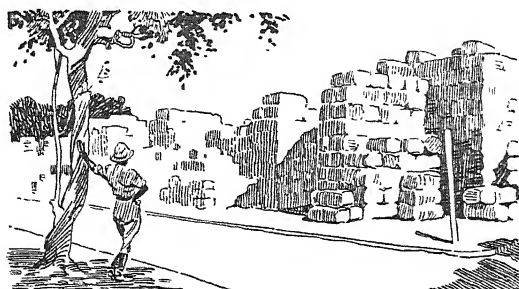
Shipments of Egyptian cotton to the U.S.A. since March 1 amount to 35,293 bales, as against 9,780 bales only during the same period of 1928. This state of affairs has brought about a narrowing of the differences between the prices of the various delivery months. Transfers from old to new crop and vice versa are made according to the favourable or unfavourable interpretation of the news received from the United States. The latest cables are rather optimistic; Reuter reports that there will be no tax at all.

Besides the above transfers, very little is done in futures, especially by exporters. Most speculators keep out of the market, preferring to await some more reliable news regarding the Farm Relief and Tax Bill in America before operating again on a larger scale.

The demand for spot cotton has considerably slackened down during the week. In Sakellaris transactions are restricted to medium grades, which are getting scarce. Premiums remain unchanged. In spite of the large business which has been going on in Uppers and Zagora, the supply of these varieties is still abundant, especially in higher grades. The cheapest qualities at present are undoubtedly Pillion and Whites, which have been neglected of late.

#### EXPORTS OF COTTON UP TO APRIL 3, 1929, CLASSIFIED BY VARIETIES AND COUNTRIES OF DESTINATION.

(Quantities expressed in bales).				(1 bale = 7.35 cantars)			
Countries of destination	During the week ending April 3, 1929			Other Kinds	Total	From 1/9/28 to 3/4/29	Ratio per 1,000
England .. ..	2,495	4,368	200	247	7,310	253,424	347.20
British India .. ..	50	—	—	—	50	569	0.78
Austria .. ..	—	—	—	—	—	4,574	6.31
Belgium .. ..	45	30	—	30	105	5,146	7.10
China .. ..	—	500	—	—	500	700	0.97
Czecho-Slovakia .. ..	60	419	30	30	539	14,111	19.59
France .. ..	940	1,435	116	216	2,707	95,923	132.47
Germany .. ..	250	1,375	300	—	1,925	42,201	58.49
Greece .. ..	—	25	—	—	25	263	0.34
Holland .. ..	—	30	—	—	30	422	0.58
Hungary .. ..	50	—	—	—	50	616	0.85
Italy .. ..	645	885	—	4	1,534	51,663	71.22
Japan .. ..	150	100	200	—	450	30,151	41.42
Palestine .. ..	—	—	—	—	—	58	0.08
Poland .. ..	—	140	—	—	140	6,537	9.10
Portugal .. ..	25	—	—	—	25	480	0.65
Russia .. ..	480	150	10	—	730	35,002	48.27
Spain .. ..	100	96	—	—	196	16,735	23.01
Sweden .. ..	—	—	—	—	—	170	0.23
Switzerland .. ..	135	991	60	31	1,217	31,844	44.19
U.S.A. .. ..	3,825	10,510	—	5	14,340	135,514	186.54
Other countries .. ..	—	50	—	—	50	442	0.61
Total .. ..	9,250	21,104	1,006	563	31,923	726,545	1,000.00
Total to 3/4/29 by varieties	227,591	442,258	34,317	22,379	—	—	—



# East Indian Cotton.

## FINAL COTTON CROP FORECAST, 1928-29.

### ALL-INDIA.

This memorandum is based on reports received from all the provinces and states, and refers to the entire cotton area of India. It deals with both the early and late crops of the season. Information regarding the late crop in certain tracts, chiefly in Madras and the southern division of Bombay, is not, however, complete at this stage. Besides, owing to serious damage done to the crop this year by the cold wave at the end of January in one of the main cotton-growing divisions of Bombay, viz., Gujarat, the out-turn of the crop in that division cannot be accurately estimated at present; and the All-India figures now reported are, therefore, incomplete to a certain extent. The usual supplementary memorandum to be issued in April will, however, contain full and final figures for Madras and Bombay, together with the revised and fuller estimates, if any, for other tracts.

The total area now reported is 25,874,000 acres, as against 23,910,000 acres, the revised estimate of last year, or an increase of 8 per cent. The total estimated yield, so far reported, stands at 5,204,000 bales of 400 lbs. each, which, as noted above, is exclusive of the yield in Gujarat, which covers an area of 3,298,000 acres under the crop this year.

The condition of the crop, on the whole, is reported to be fair.

The detailed figures for each province and state are stated below:—

Provinces and States	Acres (thousands)		Bales of 400 lbs. (thousands)		Yield per acre lbs.	
	1928-29	1927-28	1928-29	1927-28	1928-29	1927-28
Bombay* .. ..	7,367	6,912	†870	1,431	†86	83
Central Provinces and Berar .. ..	4,972	4,796	1,301	1,235	105	103
Madras* .. ..	2,391	2,123	519	447	87	84
Punjab* .. ..	2,825	2,067	616	602	87	116
United Provinces* ..	715	643	255	199	143	124
Burma .. ..	315	326	56	67	71	82
Bengal* .. ..	79	78	18	20	91	103
Bihar and Orissa ..	73	77	14	14	72	73
Assam .. ..	44	45	17	15	155	133
Ajmer-Merwara ..	44	42	21	14	191	133

## EAST INDIAN COTTON

Provinces and States	Acres (thousands)		Bales of 400 lbs (thousands)		Yield per acre lbs	
	1928-29	1927-28	1928-29	1927-28	1928-29	1927-28
North-West Frontier						
Province ..	17	11	4	2	94	73
Delhi ..	2	2	1	1	200	200
Hyderabad ..	4,002	3,631	994	951	99	105
Central India ..	1,041	1,263	197	234	76	74
Baroda ..	793	806	68	124	34	62
Gwalior ..	645	585	107	115	66	79
Rajputana ..	465	422	123	97	106	92
Mysore ..	76	81	23	25	121	123
Total ..	<u>25,874</u>	<u>23,910</u>	<u>†5,204</u>	<u>5,593</u>	<u>†92</u>	<u>94</u>

\* Including Indian States.

† Excluding Gujarat for which it is not at present possible to estimate the crop owing to serious damage by frost at the end of January last.

A statement showing the present reported estimates of area and yield, according to the recognized trade descriptions of cotton, as compared with those of the preceding year, is given below :—

## TRADE DESCRIPTIONS.

Descriptions of cotton	Acres (thousands)		Bales of 400 lbs. (thousands)		Yield per acre lbs	
	1928-29	1927-28	1928-29	1927-28	1928-29	1927-28
Oomras :						
Khandesh ..	1,334	1,444	277	288	83	80
Central India ..	1,686	1,848	304	349	72	76
Barsi and Nagar*	3,924	3,838	883	982	90	102
Hyderabad-Gaorani ..						
Berar ..	4,972	4,796	1,301	1,235	105	103
Central Provinces ..						
Total ..	<u>11,916</u>	<u>11,926</u>	<u>2,765</u>	<u>2,854</u>	<u>93</u>	<u>96</u>
Dholleras ..	2,929	2,317	†25	542	†37	94
Bengal-Sind :						
United Provinces ..	715	643	255	199	143	124
Rajputana ..	509	464	144	111	113	96
Sind-Punjab ..	2,229	1,586	535	455	96	115
Others ..	85	84	16	16	75	76
Total ..	<u>3,538</u>	<u>2,777</u>	<u>950</u>	<u>781</u>	<u>107</u>	<u>112</u>
American :						
Punjab ..	961	750	187	219	78	117
Sind ..	29	15	6	3	83	80
Total ..	<u>990</u>	<u>765</u>	<u>193</u>	<u>222</u>	<u>78</u>	<u>116</u>
Broach ..	1,162	1,226	†43	237	†33	77
Coompta-Dharwars ..	1,744	1,758	398	311	91	71
Westerns and Northern	1,742	1,421	342	198	79	56
Cocanadas ..	237	214	46	39	78	73
Tinnevelles ..	608	568	160	148	105	104
Salems ..	195	181	35	34	72	75
Cambodias ..	357	287	155	123	174	171
Comillas, Burmas and other sorts ..	456	470	92	104	81	89
GRAND TOTAL ..	<u>25,874</u>	<u>23,910</u>	<u>†5,204</u>	<u>5,593</u>	<u>†92</u>	<u>94</u>

\* Includes the whole of cotton grown in the Non-Government areas of Hyderabad.

† Excludes cotton grown in Gujarat.

## COTTON PRESS RETURNS.

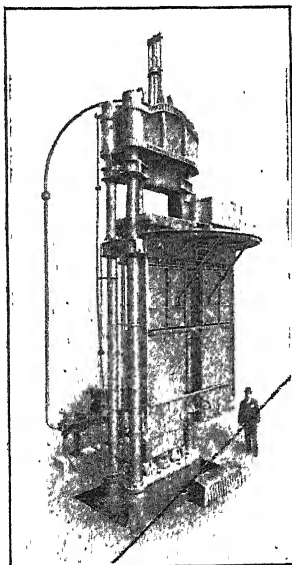
STATEMENT OF COTTON PRESSED IN BRITISH INDIA FROM  
SEPTEMBER 1, 1928, TO MARCH 22, 1929.

Province and Division or Block	Number of bales pressed.	
	Since Sept. 1, 1928	During corresponding period last year
Bombay Presidency ... ..	616,411	489,179
Bengal Presidency ... ..	7,272	16,445
United Provinces ... ..	199,516	156,881
Punjab ... ..	556,380	667,423
Central Provinces ... ..	378,260	372,409
Berar ... ..	792,406	721,238
North-West Frontier Province	1,084	—
Ajmer-Merwara ... ..	32,693	29,903
Madras ... ..	92,027	46,127
Burma ... ..	31,726	28,663
Total British India ... ..	2,707,775	2,528,268
Indian States ... ..	620,850	579,163
Total All India ... ..	3,328,625	3,107,431

The quantity of cotton pressed in Madras Presidency from February 1, 1929, to March 22, 1929, was 26,868 bales, against 14,191 for the same period last year.

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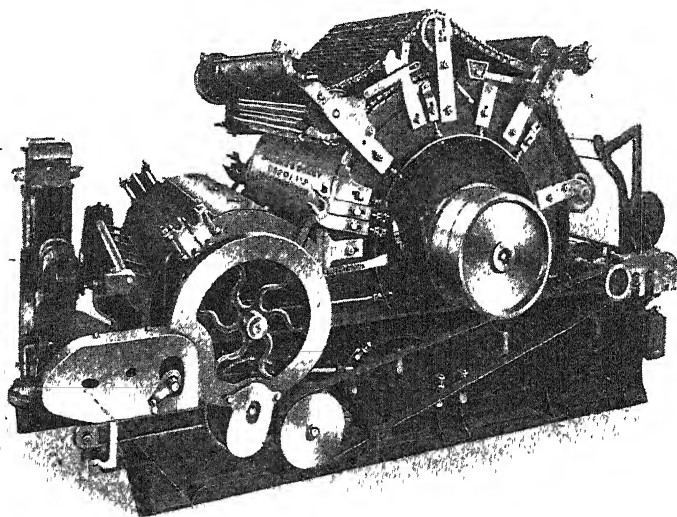
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## Cost of Manufacturing and the Multiple System of Loom Operation.

By ALBERT PALMER, Research Assistant to General Manager,  
Crompton & Knowles Loom Works, Worcester, Mass.

(Reprinted from "Textile World.")

THE widespread interest in the future of the cotton textile industry has provoked study, not only upon the part of bankers, selling houses and mill men but also on the part of the machinery manufacturers. In the belief that a return to profitable conditions of business can be accomplished only by concerted effort, the loom builders have been engaged during the past year in work to establish definitely the following points:—

- (1) The magnitude of the field for cost reduction in the section of the industry with which they are concerned.
- (2) The possibilities for cost reduction within that field.
- (3) The methods by which to study the operations of the industry.
- (4) The standards of operation against which progress can be measured.
- (5) The fundamentals of design that should be incorporated in their machinery.

### FIELD FOR COST REDUCTION.

In determining the magnitude of the field and the possibilities for savings, the investigation first developed an analysis of the elements of which manufacturing cost consists. Roughly classified they are listed below for coloured goods:—

Item	Per cent. of Process Cost	Per cent. of Total Mfg. Cost.
Yarn cost up to loom, including drawing-in ...	45	31
Total weaving cost ... ..	36	25
Finishing cost ... ..	19	13
Material cost ... ..	—	31
Total ... ..	100	100

The total weaving cost, which is the subject of this discussion, represents a substantial portion of the cost of a fabric. The figures of the table show that it is more than a third of the process cost and at least a quarter of the total manufacturing cost. The field for cost reduction here is appreciable.

In any mill the total weaving cost per yard is derived from two sources:—

- (1) The total weaving cost per loom per week
- (2) The production per loom per week.

If we know these two items for a given fabric we can find readily the cost per yard by dividing the former by the latter. Naturally the ability of a mill to make the computation rests upon a correct appreciation of the elements of cost involved and the accounting methods by which they are accumulated.

#### COMPONENTS OF WEAVING COST.

The total weaving cost per loom per week is composed of costs incurred through items that can be classified as follows:—

- (a) Wages of weaver
- (b) Wages of battery hand
- (c) Wages of fixer
- (d) Wages of all other weave-room labour
- (e) Weave-room expense.

The amount of each of these items depends upon the mill and its conditions of operation. As an illustration, let us find the probable cost for a weave room of 750 dobby looms weaving 36-in. dress goods, the construction of which is  $1/28\frac{1}{2}$ 's warp and filling, 64 sley, and 56 picks per inch. The speed is considered to be 150 picks per minute, and the period of operation 48 hours per week for 50 weeks. The cost of labour might be something like this:—

Job	Looms per Hand	Weekly Wage	Cost per Loom per Week
Weaver ... ..	10	\$28.00	\$2.80
Battery hand ... ..	60	15.00	.25
Fixer ... ..	50	30.00	.60
Total direct labour . . . . .			\$3.65
Overseer ... ..	750	\$60.00	\$0.08
Second hand . . . . .	750	45.00	.06
Third hand . . . . .	750	37.50	.05
Clerk ... ..	375	18.75	.05
Spare fixer ... ..	187	30.00	.16
Filling carrier . . . . .	107	15.00	.14
Smash piecer . . . . .	250	27.50	.11
Cloth hand ... ..	750	15.00	.02
Chain boy ... ..	375	15.00	.04
Bobbin boy ... ..	187	15.00	.08
Sweeper ... ..	750	15.00	.02
Cloth inspector ... ..	375	15.00	.04
Total day labour . . . . .			\$0.85

In computing the items termed "Weave-room expense," the total floor area for each loom is taken as 60 square feet—36 square feet for the machine and 24 square feet for its share of the aisles. At \$3 per square foot the floor area is worth \$180. The price of

the loom, assumed to be the new Crompton & Knowles "Cotton King" loom, is taken as \$510.50. Based upon these figures, the weave-room expense would be as follows:—

	Cost per Loom per Year	Cost per Loom per Week
Taxes and insurance on buildings—2% of \$180 ...	\$3.60	\$0.07
Depreciation on buildings—3% of \$180 ...	5.40	.11
Taxes and insurance on machinery—2% of \$510.50	10.21	.20
Depreciation on machinery—5% of \$510.50 ...	25.52	.51
Power—0.55 h.p. × \$27.00 per year ...	14.85	.30
Humidity—4.16 c. × 60 sq. ft. ...	2.50	.05
Heat—4.16 × 60 sq. ft. ...	2.50	.05
General expense—Office, supt., miscellaneous ...	30.00	.60
Designing ...	3.00	.06
Repairs and supplies ...	15.00	.30
Reeds and shuttles ...	7.50	.15
	<u>\$120.08</u>	<u>\$2.40</u>

Bringing together these figures, the total weaving cost per loom can be found.

Item	Cost per Loom per Week	Per cent of Total
Weaver	\$2.80	40.6
Battery hand ...	.25	3.6
Fixer ...	.60	8.7
Day labour ...	.85	12.3
Expense ...	2.40	34.8
Total .. ..	<u>\$6.90</u>	<u>100.0</u>

A study of the foregoing analysis indicates two things: First, that the cost of the weaver is the largest single element of the total weaving cost; and, second, that it is the one element that is susceptible to treatment that will bring about appreciable savings. The cost per loom per week for weaving then is the item to investigate.

That a reduction in weaving cost can be effected by an increase in the number of looms assigned to a weaver has been recognized. The textile industry is now familiar with the idea, popularly called "labour specialization" or the "multiple set system." Mill men know that through it favourable costs can be obtained. But they apparently do not realize in all cases that, under certain circumstances explained later, unfavourable results may be the outcome.

To illustrate the principle of multiple set operation, assume that the weaver's wage is \$28.00 per week. Assume also that no other item of weaving cost varies. Here is the comparison of the total weaving cost per loom per week for sets of 10, 16 and 24 looms (the difference in the amounts is brought about by the number of looms tended by the weaver):—

Item	10 Looms	16 Looms	24 Looms
Weaver ...	\$2.80	\$1.75	\$1.17
Battery hand ...	.25	.25	.25
Fixer ...	.60	.60	.60
Day labour ...	.85	.85	.85
Expense ...	2.40	2.40	2.40
Total ...	<u>\$6.90</u>	<u>\$5.85</u>	<u>\$5.27</u>
		Per cent	Per cent.
Saving over total weaving cost of 10-loom set ...		15.2	23.6
Saving, per cent. of process cost of coloured goods ...		5.5	8.5
Saving, per cent. of total manufacturing cost of coloured goods ...		3.8	5.9

## HOW MANY LOOMS PER WEAVER?

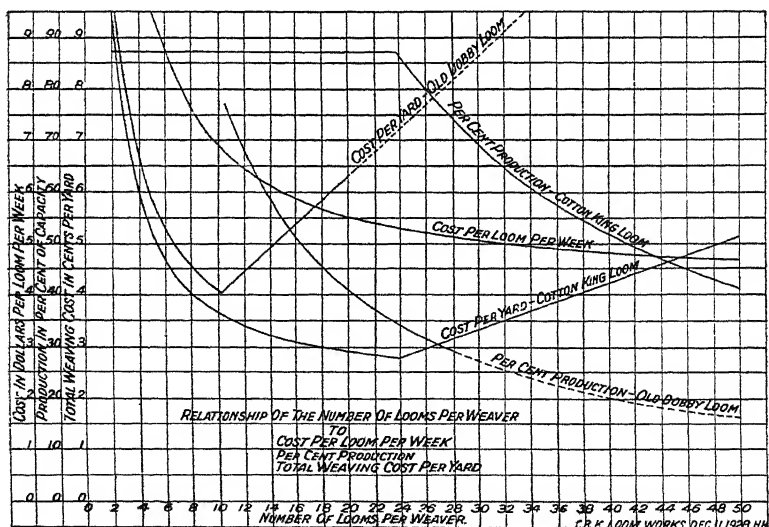
An earlier paragraph stated that the cost per yard of fabric can be found from the formula—

$$\text{Cost per yard} = \frac{\text{Production per loom per week}}{\text{Cost per loom per week.}}$$

To show any savings by the multiple set system, then, not only the cost per loom per week must be diminished but also the production per loom per week must be maintained constant or, if possible, must be increased. At this point some mills have made a mistake. They have looked solely at the production per weaver and have disregarded the production per loom, with the result that their costs have not been as low as anticipated.

The question of the number of looms that a weaver can tend is a problem of supply and demand. The weaver can supply a definite amount of work, measured in operations performed per hour. The looms demand of him a definite amount of work per loom, likewise measured in operations per hour. The number of looms for which the weaver should be responsible consequently can be determined if the quantity of work in each case is known.

If the weaver is made responsible for a number of looms in excess of the correct number he cannot keep up with the job. The looms stop faster than he can attend to them; hence some always are idle, waiting for him. The resulting lost time lowers the productive efficiency of the set. In our studies we have found mills where the time lost, because the weaver was unable to give the looms his attention, amounted to 26 per cent. of the capacity of the set, or nearly 11 times the number of minutes devoted by the weaver to work at the loom. Where a proper balance exists the lost time of this classification should be 10 per cent. or less, and should not be over twice the weaver's weaving time.



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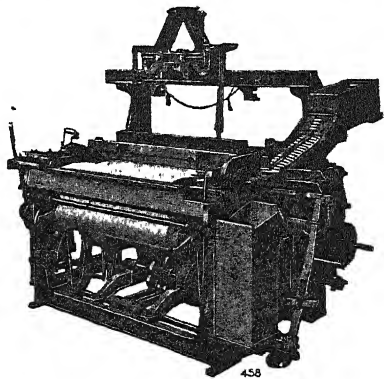
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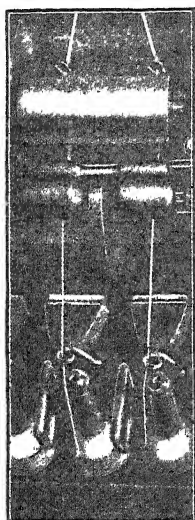


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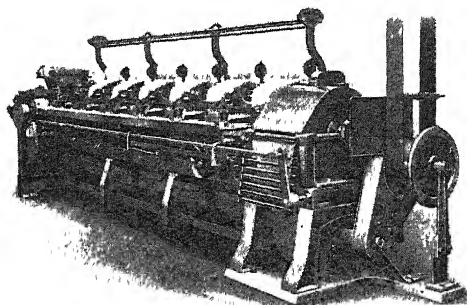
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The relationship between the cost per loom per week and the per cent. production is given graphically on the chart. In computing the cost per loom per week, everything but the cost per weaver was assumed to be constant in amount. Taking a fixed sum for the weekly wage of the weaver, then, the cost per loom per week decreases as the number of looms assigned to the weaver increases.

Now consider what happens to the operating efficiency of the set, styled the "per cent. production." Where the weaver is tending a small number of looms, the per cent. production is high. Until the size of the set is such that the work demanded of the weaver exceeds the supply which he is able to give, the per cent. production remains approximately constant. Beyond that point the idle time of the looms increases, and the per cent. production falls off.

To select the most advantageous size for the set, both the cost per loom per week and the per cent. production must be considered. With these figures, the details of the fabric, the speed of the loom, and the weekly hours of operation, the cost per yard can be determined. When found it will follow the course of the cost per yard shown on the chart, decreasing to a minimum and then increasing. The number of looms at which the minimum cost occurs is the number to be assigned to the weaver.

#### BETTER CONDITIONS AND NEW LOOMS.

But one other point remains to be discussed. That is the effect of better conditions of weaving upon production and cost. If the warp, the filling, and the mechanical condition of the looms are improved, what happens? The situation can be illustrated best by the test results of a set of Crompton & Knowles new "Cotton King" automatic dobby looms.

In the test in question the new looms were placed in a mill adjacent to some of the automatic looms of the old type weaving the same fabrics. The time studies that were taken show that the number of operations required of the weaver per hour of running was, on the new looms, 37 per cent. less than the number per loom per hour of running on the old looms. The effect of this improvement is twofold: First, it decreases the chance that two or more looms will stop at once; and, second, it decreases the time expenditure required of the weaver by each loom. The advantage is obvious. Compared with the old loom, a larger number of new looms can be run at a higher per cent. production. Assuming the cost per loom per week to be the same, the point of minimum cost per yard, shown on the chart, now drops from 4.13 cents at 10 looms per weaver with the old loom to 2.79 cents at 24 looms per weaver with the new loom. The reduction in cost then is 1.34 cents per yard, a saving of 32 per cent.

Naturally the figures given here cannot be expected to apply to all mills and all conditions. But they serve a purpose; namely, to show these important considerations:—

(1) That a substantial portion of manufacturing cost is under the control of the weave room.

(2) That the principal opportunities for saving relate to the weaver and his work.

(3) That minimum cost can be obtained only when the cost per loom per week and the yardage produced are considered simultaneously.

(4) That the minimum cost per yard can be made lower by improved weaving conditions and modern machinery—a subject which will be developed later, when methods of study, standards of operation, and their relationship to loom design are considered by the writer.

(The writer is indebted to Mr. Joel M. Barnes, head of the Barnes Textile Service, Boston, for information relating to weaver-room expense.)

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## The Weaver-Loom Balance.

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(By ALBERT PALMER, Research Assistant to the General Manager, Crompton & Knowles Loom Works, Worcester, Mass.)

(Reprinted from "Textile World," March 16, 1929.)

The problem of finding the number of looms that can be handled with the greatest degree of efficiency by the weaver is not unlike the task of designing the most efficient motor to deliver a given horse power. The capacity of the motor in terms of power input must be enough, not only to accomplish the desired productive work but also to overcome the electrical and mechanical losses that are inherent to its creation. If, for example, the productive work of the motor is to be 1 h.p., and if the losses involved in obtaining it are .25 h.p. the motor must draw 1.25 h.p. In other words, its capacity in terms of power input must be 1.25 h.p., 1 h.p. of which represents productive energy and .25 h.p. of which is lost in the form of heat caused by friction, windage, and the electrical properties of the copper and iron of which the machine is constructed.

Under these conditions the efficiency of the unit is 1 h.p. divided by 1.25 h.p., or 80 per cent. Obviously, if we desire to make a more efficient 1-h.p. motor, we can do so by cutting down the losses. If, for example, the losses are reduced to 0.125 h.p., the efficiency can be raised to 89 per cent.

An installation of looms presents a similar situation. That the weaver can obtain from them a given quantity of productive work is known. That a certain amount of lost work is inherent to their operation also is known. The capacity of the set, then, is equal to the sum of these two elements as indicated above.

### ESSENTIAL INFORMATION.

The productive time that a weaver can obtain from looms under any given set of conditions depends upon two elements:

1. The number of minutes of every hour that the weaver can devote to work at the looms.
2. The number of minutes of work per loom per hour of running that are required of him.

If these elements are known, the number of productive hours that the weaver can obtain is equal to Item 1 divided by Item 2. For example: If the weaver can devote 40 minutes of every hour to work at the loom and if he must spend two minutes per loom per hour of running to keep the looms in operation, he can produce 40 divided by 2 or 20 loom-hours of production for every hour that he works.

The problem, then, is to find the set of looms that will enable the weaver to deliver 20 loom-hours of production. By analogy to the motor the question is one of adding to the productive time the lost time that is inherent to the operation of the machines. Experience shows that losses occur because of stoppage which can be measured readily in terms of the running time of the machines. In round numbers it amounts to about 12 minutes per loom per hour of actual running. For 20 loom-hours, then, the lost time is 240 minutes, or 4 hours.

#### NECESSARY CAPACITY.

From this reasoning it follows that the capacity to be assigned to the weaver is 20 loom-hours of production plus 4 loom-hours of lost time, or 24 loom-hours. Consequently the number of looms which the weaver should tend is 24, inasmuch as that is the only number of machines which in one hour has a capacity of 24 loom-hours. From these machines the weaver can obtain 20 divided by 24, or 83.3 per cent. of the productive capacity.

The use of a method of this kind to ascertain the number of looms that a weaver can tend implies a definite knowledge of the weaver's work. The manner in which he spends his day must be known, the number of minutes that he needs to perform each operation must be determined, and the number of operations which are required of him per loom per hour of running must be found.

The average analysis of the day of weavers who are not required to fill their magazines is something like that shown in Table 1.

TABLE 1—AVERAGE ANALYSIS OF WEAVER'S DAY

	Per cent.
Weaver's weaving time .. .. .	65
Other working time .. .. .	2
Personal time .. .. .	3
Idle time .. .. .	1
Time off job .. .. .	1
Inspecting and walking time .. .. .	28
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	100
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#### "WEAVER'S WEAVING TIME."

In this analysis the term "weaver's weaving time" is used to describe the time during which the weaver is at the loom actually performing the operations that are necessary to keep the looms running. "Other working time" is the work involved in miscellaneous activities, such as sewing tags on cloth, taking cloth to the cloth truck, and other incidental work. "Personal time" represents time taken for personal needs. "Idle time" is time during which the weaver is performing no work. "Time off job" represents time during which the weaver is away from his set on an errand pertaining to his work. "Inspecting and walking time" is the balance of the time spent by the weaver, and, as the name

implies, represents the time during which the weaver is examining his warps and is walking from one loom to the next in the performance of his work.

#### WEAVER'S WEAVING TIME IMPORTANT.

Of these figures, the weaver's weaving time is the most important, inasmuch as it determines how many minutes of every hour are available for the work that keeps the looms in motion. Here for instance the weaver can devote 65 per cent. of his time, or 39 minutes of every hour, to work at the looms. Naturally, this figure varies with the conditions of the mill. If, for example, the weaver must fill his own magazines, he must devote about 10 per cent. of his time to that activity, thus reducing the time at the loom from 65 to 55 per cent. Similarly, if he is required by the mill to perform other work, he does so at the expense of the weaving time.

A question sometimes is raised concerning the "inspecting and walking time." How does it vary as the number of looms is increased? At present we are unable to give a very satisfactory answer. At the first glance one would think that the time spent in walking should increase as the number of looms per weaver increases. But tests do not verify this conclusion. The ratio of the inspecting and walking time to the weaver's weaving time remains practically constant, regardless of the size of the set. The indication, then, is that with a small set which has a high rate of stoppage the weaver walks just as much as he does with a large set which has a low rate of stoppage.

#### WEAVING OPERATIONS.

After the day of the weaver has been analysed and the number of minutes which he can devote to work at the loom has been found, a study must be made of the time to be allowed for the performance of each of the operations involved in weaving. Table 2, Column 1, gives in detail the average results of a number of tests taken on a weaver tending a set of 12 Crompton Knowles Cotton King dobby looms weaving a cotton-rayon fabric

TABLE 2—ANALYSIS OF WEAVER'S OPERATIONS—CROMPTON & KNOWLES COTTON KING LOOM.

Operation	Col. 1				Col. 2		Col. 3	
	Mins. per operation				Operations per loom per hour of running		Mins. per loom per hour of running	
Warp break .. .. .	..	..	..	..	1.180	.591	.697	
Tie back .. .. .	..	..	..	..	1.913	.010	.019	
Pick out—warp .. .. .	..	..	..	..	—	.000	—	
Loose end .. .. .	..	..	..	..	.601	.066	.040	
Clear warp .. .. .	..	..	..	..	.764	.031	.024	
Break at transfer .. .. .	..	..	..	..	.635	.173	.110	
Other filling break .. .. .	..	..	..	..	.610	.489	.298	
Pick out—filling .. .. .	..	..	..	..	1.881	.082	.154	
Knock-off at transfer .. .. .	..	..	..	..	.273	.079	.022	
Bad transfer .. .. .	..	..	..	..	.960	.038	.036	
Feeler failed to indicate .. .. .	..	..	..	..	.548	.144	.079	
Banging off .. .. .	..	..	..	..	.197	.111	.022	
Unknown .. .. .	..	..	..	..	.313	.049	.015	
Removing cloth .. .. .	..	..	..	..	1.790	.007	.013	
Miscellaneous .. .. .	..	..	..	..	.903	.204	.184	
Total .. .. .	..	..	..	..	—	2.074	1.713	

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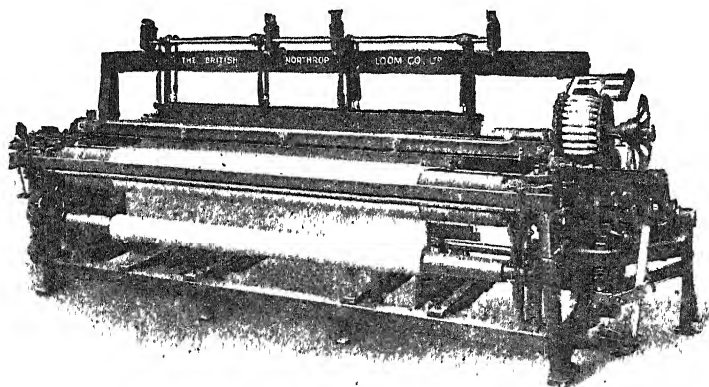
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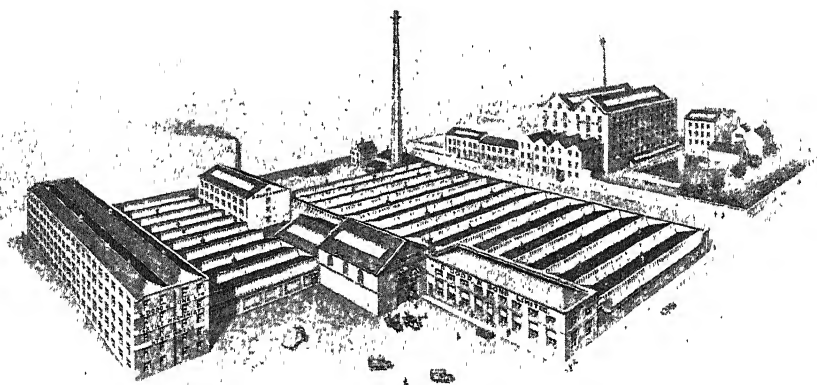
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To determine the number of operations which are required of the weaver per loom per hour of running is the last step. This information is obtained readily by observation and computation. If, for instance, a set of 12 looms operates for eight hours at an average efficiency of 90 per cent., the looms actually run for 12 times 8 times .9, or 86.4 loom-hours. If during that time 51 warp breaks occur, the rate at which the operations incident to warp breaks are performed is 51 divided by 86.4, or .591 operations per loom per hour of running.

From these figures the number of minutes spent by the weaver per loom per hour of running is easily found. Column 3 of Table 2 is the result of multiplying each item of Column 2 by the corresponding item of Column 1.

We now have enough information to find the number of running loom-hours (the productive time) which the weaver is capable of obtaining under the conditions of the example. To be fair to him, an allowance of 10 per cent. is made in his weaving time. Instead of giving him 1.713 minutes per running loom-hour, we give him 1.884. This figure, with the further fact that he can devote 65 per cent. of his time, or 39 minutes of every hour, to weaving, enables the desired computation to be made.

#### PRODUCING TIME DETERMINED.

The weaver can obtain 39 divided by 1.884 or 20.71 running loom-hours for each hour that he works. This time is the producing time of the set which he will run and corresponds to the productive work of the motor, given as an example in the first part of this discussion.

Following the analogy of the motor, the problem now is one of finding the lost time that normally can be expected. This is of several sorts and can be classified as shown in Table 3.

TABLE 3—TYPICAL ANALYSIS OF LOST TIME

	Minutes per loom per hour of running
Weaver's weaving time .. .. .	1.884
Fixer's fixing time .. .. .	.985
Lost time during which the looms are idle, not receiving the attention of the weaver .. ..	3.768
Lost time during which the looms are idle, not receiving the attention of the fixer .. ..	.197
Other lost time .. .. .	2.250
Total lost time per running loom-hour ..	<u>9.084</u>

The amounts noted against each classification were determined at the time that the figures of Table 2 were found. The "weaver's weaving time" is the total of Table 2, Column 3, plus 10 per cent. "Fixer's fixing time" is the time during which the fixer was working on stopped looms. Other "lost time" consists of time during which the looms were idle for sundry causes such as smashes and warp changes.

The time that is lost while looms are waiting for the attention of the weaver arises through the inability of the weaver to take care of more than one loom at a time. If more than one loom

stops at once, the second must be idle while the first is being worked upon by the weaver. The amount of this source of lost time is an index of the degree to which the weaver is overloaded. In a correctly sized set it should not be over 2 times the weaver's weaving time. In sets that are too large for the weaver it is as high as 10 or 12 times the weaver's weaving time. The allowance given in Table 3 for lost time during which the looms are idle not receiving the attention of the weaver was taken as 2 times the weaver's weaving time. Similarly, the allowance for lost time during which the looms are idle not receiving the attention of the fixer was taken as .2 times the fixer's fixing time, as the result of experience with that part of the work.

#### AMOUNT OF LOST TIME.

Knowing that the total number of minutes of lost time per running loom-hour is 9.084 and that the number of running loom-hours that the weaver can produce per hour is 20.71, we can find the minutes of lost time by multiplying the former by the latter. The result, 188 minutes, reduced to hours, is 3.13 hours of lost time per hour of the weaver's day.

Returning once again to the example of the motor, the capacity of the set can be found by adding the lost time 3.13 to the producing time 20.71. The result, 23.84, represents the number of loom-hours of capacity which must be assigned to the weaver to keep him fully occupied, but not overworked. In other words, this figure represents the number of looms that the weaver should tend.

This discussion can be summarized in the form of a table, like Table 4, which assumes that the weaver is given a set of 24 looms under the conditions of Tables 1, 2 and 3.

TABLE 4—ANALYSIS OF PRODUCTIVE CAPACITY OF A SET OF 24 LOOMS OPERATING FOR ONE HOUR

Item	Loom-hours	Per cent.
Producing time .. .. .	20.71	86.30
Weaver's weaving time .. .. .	.65	2.71
Fixer's fixing time .. .. .	.34	1.42
Lost time, looms not receiving attention of weaver ..	1.45	6.50
Lost time, looms not receiving attention of fixer ..	.07	.28
Other lost time .. .. .	.78	3.24
Total .. .. .	<u>24.00</u>	<u>100.00</u>

In this table the number of loom-hours of lost time was found by multiplying the items of Table 3 by 20.71 running loom-hours, the productive time of the set. The resulting minutes of lost time then were divided by 60 to reduce them to hours and were placed in Table 4, with one exception. The lost time, looms not receiving the attention of the weaver, is the amount that is necessary to make the column add to a total of 24 loom-hours, and is greater than 2 times the weaver's weaving time because; where he theoretically should tend 23.83 looms, he is slightly overloaded with a set of 24.

## CORK SPINNING ROLLERS.

The Arkwrights, Inc., the research organization founded in 1926 by the Southern Textile Association, 519, Johnstone Building, Charlotte, N.C., U.S.A., has recently accepted the reports of several new applicants for membership. The acceptances automatically make the authors members of the research organization.

The following test is one of the recent acceptances, and was conducted by John T. Wigington to determine the comparative breaking strength and end breakage of warp yarns spun with new leather-covered top rolls as compared with warp yarns spun with new cork-covered top rolls. The test was made on both picked and snapped cotton. Mr. Wigington, at the time of the test, was assistant marketing specialist, U.S. Department of Agriculture, at Clemson College, S.C.

Four yarn counts were spun: 22's, 28's, 36's and 44's. The following table shows the ends down per 100 spindles per hour:—

No. of Yarn Count	Ends Down per 100 Spindles per Hour			
	Picked Cotton		Snapped Cotton	
	Leather Ends	Cork Ends	Leather Ends	Cork Ends
22's . . . . .	2.22	2.22	1.11	1.11
28's . . . . .	3.33	2.22	0.00	2.22
36's . . . . .	2.22	3.33	0.00	2.22
44's . . . . .	2.22	2.22	6.67	6.67

This test indicates that yarns spun with cork-covered top rolls are considerably stronger than yarns spun with leather-covered top rolls. On an average there is very little difference in the strength of the yarns spun from the picked and snapped cottons. End breakage during the spinning of the test cotton was comparatively low for all yarns spun, with the exception of the 44's yarn spun from the snapped cotton. The results of this test, as of the others, are not claimed to be conclusive.

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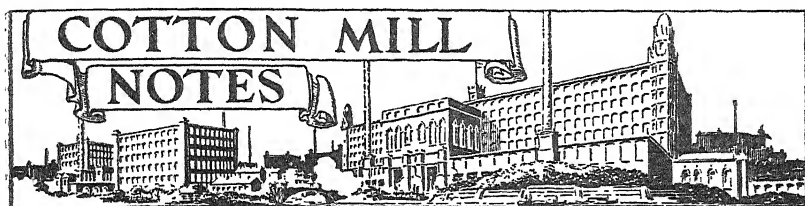
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## COLOMBIA.

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### PRODUCTION OF COTTON MILLS IN 1927.

Colombia is said to have more than 30 cotton mills, but of these only 16 supplied details regarding machinery, operatives employed, and production in 1927, according to the report of the Colombian Minister of Industries. These 16 mills reported capital and reserves amounting to 8,220,369 pesos (Colombian peso = 4.027 shillings at average exchange in 1927), of which 4,693,755 pesos represented the value of buildings and equipment. The mills employed 945 men, 2,072 women and 268 children, or a total of 3,285 wage-earners. The average daily wage was 6.9s. for men, 3s. for women and 2s. for children. Hours of labour averaged nine hours a day. The equipment of the mills consisted of 23 opening and cleaning machines, 164 cards, 39,640 spindles, 30 hand looms and 1,897 mechanical looms. The mills consumed about 7,300,000 lbs. of cotton, of which slightly more than one-third was imported. The counts of yarn produced ranged from 4's to 50's in the single and from 12½ to 25 in the ply. The output of yarns, as reported by these 16 mills, totalled approximately 6,500,000 lbs. The production of cotton cloth amounted to 15,013,000 yards, consisting of the following principal classes: Mantas (a term used in Colombia to cover plain-woven goods of any kind and frequently applied to coloured cottonades), 3,337,000 yards; oxfords, 1,799,000; carolinas (cheap ginghams), 1,576,000; bleached drills, 1,114,000; striped drills, 1,045,000; sheetings, 965,000; khaki, 75,000; serge, 4,000; and miscellaneous goods, 4,167,000. In addition, the industry produced 17,443 dozens of towels; 1,960 dozen pairs of hosiery; 146,500 dozens of undergarments; 30,116 dozen shirts; 11,800 dozen quilts and bed covers; 300 dozen shawls, and 11,827 dozens of other articles.—(Abstracted from the December, 1928, issue of *Revista de Industrias*, published in Bogota.)

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## JAPAN COTTON INDUSTRY.

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The Department of Overseas Trade, London, inform us that all cotton-spinning companies of standing, and who are members of the Japan Cotton Spinners' Association, intended to abolish night work as from February last.

The mills expect to run two shifts of  $8\frac{1}{2}$  hours each actual working, with a half-hour rest, and for change-over of shifts. The mill owners hope to arrange that the operatives suffer no loss in their daily earnings, so that the extra cost of production will fall entirely on the owners.

Those mills which voluntarily abolished night work before March 31 are subject to only 7 per cent. instead of 15 per cent. curtailment of activity at present in force.

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## CHINA.

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The Ministry of Industry, Commerce and Labour of the Chinese Government recently drafted a Bill relating to factories. The Bill is at present under consideration by the Legislative Council and will probably be promulgated during the spring of this year. Some of its provisions are as follows:—

*Contracts of Employment.* Children under 14 years of age may not be employed; young persons between the ages of 14 and 16 may only be employed on light work; an age certificate may be granted free of charge by the census administration. Collective agreements must be drawn up in writing and approved by the public authorities.

*Hours of Work.* The working day for adults shall in principle be of eight hours; exemptions up to the limit of ten hours may be granted by the authorities in view of special local conditions, the special nature of the factory, or the seasonal nature of the work. Further, when the interests of production require it, the employer may ask that hours of labour be lengthened, up to a total increase of three hours a day or 36 hours a month. The workers are free to refuse to lengthen the hours if they can show adequate reason for their refusal. The hours of young workers may not be lengthened. Night work for women is forbidden between 10 p.m. and 6 a.m. and night work for young persons between 7 p.m. and 6 a.m. Work in shifts must be sanctioned by the authorities; shifts must be changed at least once a week.

*Rest Periods and Holidays.* A compulsory rest of 30 minutes must be granted to adults after every five hours' continuous work and to young persons after every four hours. A weekly rest of at least 18 consecutive hours must be granted, exclusive of public holidays. After each period of six months' continuous work one week's special leave must be allowed. Payment must be made for holidays whether public or special.

*Methods of Calculating Output.* The average output of the workers must be calculated according to the methods laid down by the works council.

*Wages.* A minimum wage must be fixed in every locality in accordance with the conditions of living. In certain instances wages may be increased or reduced with the approval of the proper authorities. For instance, wages may be reduced in the event of strong foreign competition, or a collapse of the external market,

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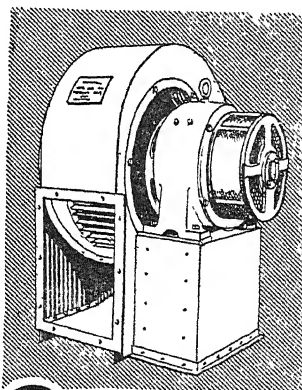
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of a reduction in productive capacity owing to unavoidable circumstances, of a decline in the capital value by reason of depreciation of the currency, or of a shortage of raw material. Wages may be increased in the event of a recovery of productive capacity after a period of depression entailing a reduction of wages, and in the event of the price index rising by 10 per cent. above the wage index of the preceding half-year. In the event of a lengthening of hours of work the rate of wages for overtime must be 25 to 50 per cent. above normal wages. Workers must be paid at least twice a month. No part of the wages may be retained for the purpose of payment of contingent fines.

*Profit Sharing.* The net profits of every factory, after deduction of the amounts necessary to constitute legal reserves for the purpose of meeting possible losses and developing the undertaking, and after deduction of the interest payable on fully paid-up shares at a rate which should in principle be of 8 per cent. per annum, must be divided as follows: 10 per cent. to the management, 45 per cent. to the shareholders and 45 per cent. to the workers. The amount allotted to the workers must be divided in proportion to the amount of wages actually earned, seniority and standard of service.

*Health and Safety.* Factories must possess a staff of specialists to deal with health and safety in the workshops. The Bill prescribes a minimum of health measures. Safety must be ensured by means of regulations and propaganda, by films, lectures, pamphlets and pictures. The public authorities reserve to themselves the right of ordering the total or partial closing of workplaces in the event of inadequacy of measures for health and safety.

—(*International Labour Office.*)

## INDIA.

### BOMBAY'S IMPORTS AND EXPORTS OF COTTON PIECE GOODS DURING 1928.

Imports of cotton piece goods into the Presidency of Bombay (excluding Sind) during 1928 are given in the following table, abstracted from the December, 1928, issue of "Statistics of Import and Export Trade in Cotton Yarn and Piece Goods of the Presidency of Bombay (excluding Sind)," published by the Bombay Mill Owners' Association:—

Classes	Quantities in 1,000 yards					
	United Kingdom	Japan	United States	Switzerland	Italy	All countries
Cotton piece goods:						
Total .. ..	350,688	115,337	26,655	17,017	23,502	548,553
Unbleached .. ..	49,730	76,884	1,125	—	—	129,876
Bleached .. ..	122,861	889	708	6,728	755	136,163
Printed .. ..	86,404	10,316	138	277	6,354	103,695
Dyed .. ..	58,323	4,531	1,973	856	2,322	68,439
Woven coloured ..	12,076	21,809	53	226	3,409	39,756

The foregoing totals include 681,000 yards of canvas, 35,787,000 yards of cotton and rayon mixtures, and 34,156,000 yards of fents, details of which are not available by countries.

Exports of Indian-made piece goods from Bombay during 1928 were as follows:—

Exported to	Yards
Red Sea ports .. . . .	9,551,014
East Africa .. . . .	31,796,779
Persian Gulf ports .. . . .	57,207,595
European countries .. . . .	361,244
Levant and Black Sea ports .. . . .	458,716
Ceylon and Straits .. . . .	4,837,018
Egypt and North Africa .. . . .	366,760
South Africa .. . . .	1,834,030
Other countries .. . . .	63,935
Total .. . . .	<u>106,477,091</u>

### U.S.A. SOUTHERN MILLS.

The following statement shows the number of mills in the South-Eastern States of U.S.A., with their equipment on January 1, 1929:—

State	Total Mills	Total Spindles	Total Looms	Total Knitting Machines
Alabama .. ..	109	1,780,718	32,782	2,733
Georgia .. ..	205	3,195,702	58,533	8,880
North Carolina .. ..	582	6,412,570	97,543	26,697
South Carolina .. ..	194	5,540,282	132,665	1,446
Tennessee .. ..	114	693,364	10,090	16,691
Total .. ..	<u>1,204</u>	<u>17,622,636</u>	<u>331,613</u>	<u>56,453</u>

The following figures show the amount of equipment added to the mills of the South-Eastern States during 1928. It is estimated that some 50 per cent. of the spindles installed were moved south from other sections.

State	Spindles	Looms	Knitting Machines
Alabama .. ..	169,604	4,277	659
Georgia .. ..	31,924	921	926
North Carolina .. ..	54,672	3,176	3,637
South Carolina .. ..	68,428	2,674	258
Tennessee .. ..	1,000	938	849
Total .. ..	<u>325,628</u>	<u>11,986</u>	<u>6,329</u>

In 1927 the corresponding totals were:—

Spindles .. ..	539,184
Looms .. ..	11,585
Knitting Machines .. ..	6,267

The number of spindles reported to be on order for installation in 1929 is as follows:—

Alabama .. ..	64,000
Georgia .. ..	64,248
North Carolina .. ..	6,500
South Carolina .. ..	89,000
Tennessee .. ..	20,000
Total .. ..	<u>243,748</u>

# *Reduce your Costs!*

In the majority of cases **HIGHER  
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**LABOUR-SAVING** Machinery  
are involved.

Preparation of yarn for weaving is a process which, hitherto, has been non-profit producing, but a necessary evil.

In order to convert these processes into profit-earning, it would be well for you to investigate very closely—

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for Tying-in instead of Twisting-in  
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## **MANCHESTER**

## Night Shift Elimination Effect.

The U.S. Department of Commerce has compiled some interesting figures showing the total number of cotton spindles that would have been required in the country during the cotton seasons from 1921 to 1928, inclusive, if the machinery in each of those years had been operated only on a legal single shift. This figure is a weighted figure, and takes into consideration the number of spindles in place in each State and the legal number of hours that one shift can operate when women are employed. From this data the spindles that would have been necessary to operate the same number of hours if there were no overtime, and the spindles idle because of overtime, were computed.

These statistics were published in the February Bulletin of the National Association of Cotton Manufacturers with the following comment:—

	1921-1922	1922-1923	1923-1924	1924-1925
1.*Spindle hours, total .. ..	89,308,613.376	101,931,101.448	84,359,693.047	91,054,615.317
2.*Spindles in place .. ..	36,783,831	37,236,363	37,495,442	37,880,011
3.†Active Spindles .. ..	32,970,016	34,608,801	32,406,130	32,114,718
4.†Spindles necessary if no overtime	33,358,463	37,887,673	31,254,864	34,806,009
5. Spindles idle because of overtime	388,447	3,278,872	—	2,691,291
6. Spindles less than active ..	—	—	1,151,266	—
7. Spindles more than in place ..	—	651,310	—	—
8. Spindles less than in place ..	3,425,368	—	6,240,578	3,074,002

	1925-1926	1926-1927	1927-1928
1.†Spindle hours, total .. ..	93,941,080.761	102,605,403.478	96,451,049.937
2.*Spindles in place .. ..	37,809,761	37,177,910	36,178,918
3.†Active Spindles .. ..	32,356,680	32,540,548	31,068,683
4.†Spindles necessary if no overtime	34,843,709	38,736,233	35,585,150
5. Spindles idle because of overtime	2,487,209	5,495,685	4,516,467
6. Spindles less than active ..	—	—	—
7. Spindles more than in place ..	—	858,323	—
8. Spindles less than in place ..	2,966,052	—	593,768

\* Department of Commerce.

† Based on weighted hours per day single shift

These figures show that in 1923-1924 the overtime operations were not sufficient to have run the active spindles full time on single shift. In two years, 1922-1923 and 1926-1927, there was enough overtime operation to have required more than the total number of spindles in place to equal the spindle hours operated. In the other five years under consideration the overtime operation of spindles was not sufficient to have required the total number of spindles in place, even though all of the spindles were run on a single-shift basis.

Line 1 shows the total number of spindle hours operated as reported to the Department of Commerce.

Line 2 gives the spindles in place, and line 3 the active spindles.

Line 4 is the computed number of spindles that would have been necessary to run the same number of spindle hours if there had been no overtime.

Line 5 is the computed number of spindles idle because of overtime, and is the difference between line 4 and line 3.

In line 6 is shown the number of active spindles that could not have been operated, even though there had been no overtime.

Line 7 is the computed number of spindles more than the spindles in place that would have been required had there been no overtime.

Line 8 shows the number of spindles, less than the spindles in place, that would have been required to operate the total number of hours.

## BRAZIL.

The Centro Industrial de Fiação e Tecelagem de Algodão do Rio de Janeiro (Association of Rio de Janeiro Master Cotton Spinners), published last February, gives statistics relative to the Brazilian cotton-spinning and weaving industry during the year 1927.

There were at that time 354 cotton firms in Brazil with a capital of 641,493,351\$170. The total spindles in the mills are stated as 2,584,050; the looms are estimated to amount to 78,383, and the total operatives employed were 128,613.

The annual production of cloth in 1927 amounted to 695,063,826 metres, and the weight of yarn produced by the spinning mills was 36,951,233 kilos.

The following table gives the full particulars by States:—

States	No of Mills	Annual production metres	No of Spindles	No. of Looms	No of Operatives	Annual consumption kilos
Alagoas .. ..	11	28,129,430	90,166	2,683	6,570	3,995,778
Bahia .. ..	16	34,979,889	109,500	6,110	6,126	4,389,750
Ceará .. ..	12	5,285,141	21,262	595	1,921	1,686,027
Districto Federal ..	22	111,645,334	730,732	16,908	21,954	14,727,322
Espirito Santo ..	2	3,916,676	8,872	361	551	480,421
Maranhão .. ..	10	15,920,960	73,430	2,224	3,437	2,298,105
Minas Geraes ..	93	72,467,283	224,616	7,718	13,010	9,395,751
Paraná .. ..	4	240,000	—	20	30	20,000
Parahyba do Norte	4	14,800,000	38,976	1,512	2,878	1,462,000
Pernambuco ..	15	64,986,420	109,880	4,300	9,495	6,551,409
Piauhv .. ..	1	342,902	2,556	168	236	104,136
Rio de Janeiro ..	25	69,275,503	225,151	6,825	10,095	9,198,588
Rio Grande do Norte	2	2,700,000	3,724	176	500	430,000
Rio Grande do Sul ..	4	6,156,950	34,104	1,198	2,357	1,400,000
Santa Catharina ..	22	4,325,249	17,036	620	1,520	947,926
Sergipe .. ..	10	30,292,746	53,632	2,444	4,735	3,574,385
São Paulo .. ..	101	229,599,343	840,413	24,521	43,198	45,225,404
	354	695,063,826	2,584,050	78,383	128,613	105,887,002

The same table for 1926 will be found on page 171 of INTERNATIONAL COTTON BULLETIN, No. 21.

## THE TOYODA AUTOMATIC LOOM.

A new high-speed automatic loom, produced by the Toyoda Automatic Loom Works, Nagoya, Japan, has recently attracted the attention of the European press. The Toyoda loom is of the

shuttle-changing type, but no stoppage or slowing-down of the loom is necessary for the change of the shuttle. The spare shuttles are held one above the other in a magazine on the left-hand side of the machine. As soon as the shuttle is empty or nearly so, or if the weft thread breaks, the loom ejects the shuttle in use and replaces it by the bottom shuttle in the magazine. The Toyoda loom is strongly constructed, and is capable of working at a maximum speed of 250 picks per minute, but only 210 picks per minute is the actual maximum mill speed.

The cost of this automatic loom is Y.600 (£60), an ordinary Japanese loom costing Y.200 (£20); the company expect most of the ordinary looms in Japan to be replaced by automatic looms. There are already over 13,000 automatic looms in that country out of a total of 80,000 looms.

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### EIGHT LOOMS PER WEAVER.

---

At a meeting in Manchester on Saturday, the General Council of the Weavers' Amalgamation, which represents all the operative weavers' organizations of Lancashire, decided to support a scheme proposed by a number of Burnley manufacturers for reducing production costs.

The scheme is that each weaver shall have charge of eight looms instead of the usual four, and that this experiment shall be tried for a year on 4 per cent. of the looms owned by the employers concerned. It is considered that the scheme will appreciably reduce costs, notwithstanding that it will involve the employment of additional unskilled labour for certain work of which the weavers will have to be relieved, some extra remuneration, presumably, for the weavers, and the possibility of a slowing-down of production per loom when the operative has charge of eight looms instead of four. The scheme may be regarded as one of the alternatives to the automatic loom, which is being experimented with elsewhere in Lancashire.

*The Manchester Guardian.*



# MISCELLANEOUS

## WORLD PRODUCTION OF RAYON BY COUNTRIES.

Country	1926 lbs.	1927 lbs.	1928 lbs.
United States ..	62,575,000	75,050,000	97,700,000
Great Britain ..	25,500,000	38,803,000	52,000,000
Italy ..	35,000,000	36,000,000	45,000,000
Germany ..	26,000,000	31,000,000	43,000,000
France ..	17,500,000	21,000,000	30,000,000
Holland ..	13,500,000	16,500,000	18,000,000
Belgium ..	13,100,000	13,500,000	15,000,000
Switzerland ..	8,000,000	10,340,000	12,000,000
Japan ..	5,500,000	8,000,000	14,000,000
Poland ..	2,000,000	4,000,000	6,500,000
Austria ..	3,500,000	3,500,000	4,000,000
Czecho-Slovakia ..	2,800,000	3,500,000	3,000,000
Spain ..	300,000	1,000,000	1,500,000
Hungary ..	*	*	660,000
Canada ..	2,250,000	2,600,000	3,750,000
Brazil ..	*	*	800,000
Sweden ..	*	*	330,000
All others ..	1,555,000	2,075,000	700,000
Total ..	<u>219,080,000</u>	<u>266,868,000</u>	<u>347,940,000</u>

\* Included in "All others"

## ESTIMATED PRODUCTION OF RAYON BY PROCESSES IN 1928 IN VARIOUS COUNTRIES.

(In thousands of lbs.)

Country	Total Production	Viscose	Acetate	Cupra	Nitro- Cellulose
Austria ..	4,000	4,000	—	—	—
Belgium ..	15,000	9,000	1,200	300	4,500
Czecho-Slovakia ..	3,000	3,000	—	—	—
France ..	30,000	26,380	3,000	500	120
Germany ..	43,000	34,250	750	8,000	—
Great Britain ..	52,000	38,000	12,000	2,000	—
Holland ..	18,000	17,500	500	—	—
Hungary ..	660	—	—	—	660
Italy ..	45,000	43,550	800	650	—
Poland ..	6,500	4,750	—	—	1,750
Spain ..	1,500	1,500	—	—	—
Sweden ..	330	330	—	—	—
Switzerland ..	12,000	11,900	100	—	—
Japan ..	14,000	14,000	—	—	—
Canada ..	3,750	2,500	1,250	—	—
United States ..	97,700	82,100	5,000	2,100	8,500
Brazil ..	800	800	—	—	—
Others ..	700	700	—	—	—
Total ..	<u>347,940</u>	<u>294,260</u>	<u>24,600</u>	<u>13,550</u>	<u>15,530</u>

REVISED ESTIMATES OF WORLD PRODUCTION AND CONSUMPTION  
OF RAYON IN THE YEAR 1928.

(In thousands of lbs.)

Country	Production	Imports	Exports	Consumption
Austria .. ..	4,000	2,000	3,000	3,000
Belgium .. ..	15,000	900	8,325	7,575
Czecho-Slovakia ..	3,000	6,000	1,200	7,800
France .. ..	30,000	1,250	11,400	19,850
Germany .. ..	43,000	18,275	13,625	47,650
Great Britain .. ..	52,000	2,700	9,600	45,100
Holland .. ..	18,000	2,500	16,600	3,900
Hungary .. ..	660	700	600	760
Italy .. ..	45,000	800	28,500	17,300
Poland .. ..	6,500	1,500	3,500	4,500
Spain .. ..	1,500	3,000	—	4,500
Sweden .. ..	330	900	—	1,230
Switzerland .. ..	12,000	3,000	7,100	7,900
Others .. ..	700	—	—	3,500
<b>Total, Europe ..</b>	<b>231,690</b>	<b>—</b>	<b>—</b>	<b>174,565</b>
China .. ..	—	13,000	—	13,000
India .. ..	—	8,500	—	8,500
Japan .. ..	14,000	250	100	14,150
<b>Total, Asia ..</b>	<b>14,000</b>	<b>21,750</b>	<b>100</b>	<b>35,650</b>
Canada .. ..	3,750	1,500	—	5,250
United States .. ..	97,700	12,000	210	109,490
Others .. ..	—	1,000	—	1,000
<b>Total, N America</b>	<b>101,450</b>	<b>14,500</b>	<b>210</b>	<b>115,740</b>
<b>Total, S America</b>	<b>800</b>	<b>6,000</b>	<b>—</b>	<b>6,800</b>
Australasia .. ..	—	2,500	—	2,500
<b>Grand Totals ..</b>	<b>347,940</b>	<b>—</b>	<b>—</b>	<b>336,255</b>

### THE MIDDLETON COTTON GIN.

The new Middleton roller gin, recently introduced by Messrs. Armstrong, Whitworth & Co. Ltd., has already been exported to India, Peru, East Africa and Egypt, and reports from the users state that this new gin is giving every satisfaction.

The gin is equipped with roller bearings and oil baths for all moving parts. All belting has been eliminated, with a consequent gain in power and avoidance of slip. The makers claim that 25 per cent. less power is required for the Middleton gin, as compared with the older types. No oilers or belt attendants are required, and one fitter can overlook a larger number of gins.

Adjustments of the gin for different lengths of staple are easily and quickly effected. The gin is furthermore fireproof, as no wood is used in its construction.

The floor space occupied by the gin is only 5 ft. 7½ in. × 3 ft. 5½ in.

### COTTON FABRICS CONSUMED BY TYRE INDUSTRY IN U.S.A.

The consumption of tyre fabrics by the automobile tyre industry in 1928, according to estimates of cotton fabrics made by the

Rubber Association of America, and representatives of 75 per cent. of the tyre industry, was 222,243,398 lbs., or nearly 45,000,000 lbs. in excess of the 1927 high record.

## STATE OF TRADE.

### SWITZERLAND.

*The following State of Trade report arrived too late for translation and inclusion in the section dealing with the state of trade:—*

#### SITUATIONSBERICHT I. QUARTAL 1929, SCHWEIZ.

Die bereits in unserm letzten Dezemberbericht konstatierte Depression hat im neuen Jahre weitere Fortschritte gemacht, sodass zu Ende des ersten Quartals 1929 gegen 4000 Arbeiter von Kurzarbeit betroffen sind, wozu noch zahlreiche gänzliche Stilllegungen von Spindeln und Webstühlen kommen. Unter Berücksichtigung aller Betriebseinschränkungen wird die Produktionskapazität unserer gesamten Baumwollindustrie kaum mehr zu 80 Prozent ausgenützt. Drängendes Ueberangebot in Gespinsten und Geweben zu Preisen, die grösstenteils unter den Gestehungskosten liegen, kennzeichnet den Ernst der Krise. Dabei besteht leider nirgends Aussicht auf eine baldige Besserung der Geschäftslage.

Grob- und Mittelfeinspinnerei leiden unter ausländischen Schleuderangeboten und verminderter Konsumfähigkeit der Weberei. Arbeit auf Stapel und Betriebsreduktionen bis zu 50 Prozent sind an der Tagesordnung. Bezeichnenderweise bleiben auch Etablissements mit ordentlichen Orderbeständen davon nicht verschont, da sie Mangels Erteilung der Dispositionen seitens der Kundschaft festgelegt sind. Die Feinspinnerei teilt bei zunehmenden Produktionseinschränkungen ein ähnliches Schicksal, während der Zwirnerei aus dem schlechten Geschäftsgang der Stickerei und Buntweberei eine weitere Verschärfung der heute schon unerträglichen Absatzkrise zu erwachsen droht. In der Weberei wird durchgehend über kurze Lieferfristen und kleine Bestellungen, die unrationelle Arbeitsdisposition zur Folge haben, geklagt, ein Uebelstand der zum Teil auch störend auf die Spinnerei zurückwirkt. Rund ein Drittel der Grob- und Mittelfeinspinnerei arbeitet mit Betriebsreduktionen bis zu 40 Prozent. Noch ungünstiger schneidet die Feinspinnerei ab, deren volle Produktionskapazität kaum mehr zu 70 Prozent ausgenützt ist. Einzig die Buntweberei vermochte sich bis anhin in der Hauptsache volle Beschäftigung zu sichern, doch wirkt die allgemeine Darniederlage auch bei ihr ungünstig auf Preisgestaltung und Ansprüche seitens der Kundschaft, das umsomehr, als sich eine gewisse ausländische Konkurrenz alle Mühe gibt, um jeden Preis ins Geschäft zu kommen.

	Import		Export	
	Menge q. kg.	Wert Fr.	Menge q. kg.	Wert Fr.
Baumwollgarne ...	10,102.56	8,646,000	16,240.48	11,832,321
Baumwollgewebe ...	7,233.31	8,112,083	14,304.96	30,198,308
Stickereien ...	22.86	118,266	5,494.95	19,746,453
	<u>17,358.73</u>	<u>16,876,349</u>	<u>36,040.39</u>	<u>61,777,082</u>

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# COTTON TRADE STATISTICS

## BRAZIL.

### IMPORTS OF COTTON YARNS.

Country of Origin	Quantity		Value (in milreis)	
	1926	1927	1926	1927
Allemanha .. ..	79,673	98,519	1,160:211	1,707:138
Argentina .. ..	—	—	—	—
Austria .. ..	—	—	—	—
Belgica .. ..	2,817	3,279	62,334	88,134
Estados Unidos .. ..	383,455	586,687	5,432:942	10,570:893
França .. ..	5,723	13,263	140:294	339:496
Grã-Bretanha .. ..	1,119,185	1,087,665	15,489:477	17,258:578
Hollanda .. ..	2,811	4,319	79,636	122:613
India .. ..	—	—	—	—
Italia .. ..	26,286	17,014	369:157	283:498
Japão .. ..	—	85	—	1:178
Suecia .. ..	—	—	65	—
Suissa .. ..	5,245	17,321	82:802	455:882
Tcheco-Slovaquia .. ..	2,126	—	19:393	—
Uruguay .. ..	—	—	—	—
	<u>1,627,321</u>	<u>1,828,152</u>	<u>22,836:311</u>	<u>30,827:410</u>
Equivalent in £ sterling ..	—	—	681,382	750,021

### COTTON CLOTH EXPORTS.

Destination	Kilos			
	1923	1924	1925	1926
Argentina .. ..	405,629	22,995	—	3,931
Allemanha .. ..	—	188	—	240
Belgica .. ..	530	—	—	—
Bolivia .. ..	3,327	590	4,142	668
Chile .. ..	7,721	—	—	—
Estados Unidos .. ..	—	—	—	1,811
Grã-Bretanha .. ..	544	175	11,796	7,982
Hespanha .. ..	—	—	—	30
Hollanda .. ..	95	—	—	—
Italia .. ..	—	184	—	—
Paraguay .. ..	110,267	6,174	—	—
Peru .. ..	59,912	14,138	1,045	180
Portugal .. ..	2,894	—	—	154
T. Européa .. ..	—	—	639	—
Uruguay .. ..	194,852	12,868	5,720	—
Columbia .. ..	—	—	—	1,748
Total .. ..	<u>785,771</u>	<u>57,242</u>	<u>23,342</u>	<u>14,996</u>
				<u>7,984</u>

## BRAZIL—Continued

## IMPORTS OF COTTON CLOTH.

Country of Origin	Quantity							
	1920	1921	1922	1923	1924	1925	1926	1927
Allemanha ..	30,542	30,776	38,716	54,368	55,155	80,635	181,437	159,067
Argentina ..	7,464	100	16,760	5,779	2,138	6,715	541	2,243
Belgica ..	42,471	11,889	10,178	37,945	225,481	55,615	44,874	40,910
Estados Unidos ..	674,731	132,269	282,476	233,340	558,976	491,720	315,471	411,766
França ..	186,554	266,494	181,059	422,143	423,269	367,294	458,902	486,531
Grã-Bretanha ..	3,624,704	1,397,676	2,402,428	2,864,556	4,351,820	5,822,588	5,882,910	5,736,029
Hespanha ..	3,165	2,382	992	184	5,945	702	3,084	1,414
Italia ..	168,288	100,759	52,496	90,700	171,858	324,033	236,737	181,595
Japão ..	3,345	792	837	1,112	222	445	1,830	1,067
Suissa ..	116,908	54,979	148,098	179,386	234,078	114,445	153,592	204,296
Uruguav ..	4,460	6,188	7,276	19,321	3,513	12,546	1,851	815
Diversos ..	4,756	11,948	7,465	3,815	9,585	42,592	35,581	19,591
Total kilog ..	4,867,388	2,016,252	3,148,781	3,912,649	6,042,040	7,328,340	7,318,810	7,245,324

Country of origin	Value (Milreis)							
	1920	1921	1922	1923	1924	1925	1926	1927
Allemanha ..	705,718	797,301	563,542	1,617,908	1,694,564	2,467,012	3,764,295	4,333,669
Argentina ..	153,173	3,991	59,542	34,200	34,188	68,341	5,941	60,782
Belgica ..	583,204	185,780	161,409	689,864	402,239	931,907	538,872	639,543
Estados Unidos ..	16,702,137	2,757,799	7,474,383	8,420,544	16,181,137	11,860,813	6,680,162	11,969,567
França ..	3,341,237	5,551,835	5,089,860	14,386,040	14,003,837	9,997,544	9,080,772	12,008,235
Grã-Bretanha ..	69,178,181	40,852,584	52,860,572	83,961,816	113,822,981	142,649,767	104,072,358	117,946,048
Hespanha ..	66,586	76,381	25,734	3,655	26,761	22,067	48,335	37,954
Italia ..	1,063,800	1,742,286	877,892	2,070,483	3,566,359	4,563,096	3,581,757	3,716,854
Japão ..	88,770	18,469	29,665	20,108	2,150	4,070	15,496	13,305
Suissa ..	5,872,600	3,324,577	8,173,426	9,464,178	11,703,563	5,728,133	5,346,313	8,377,272
Uruguav ..	95,519	145,553	261,882	269,955	88,301	178,247	29,771	8,475
Diversos ..	71,808	318,710	121,575	82,026	247,412	1,067,551	470,863	648,538
Total	98,523,042	55,775,266	75,702,482	121,020,876	161,774,492	179,539,148	133,634,935	160,748,182
Equivalent in £ sterling ..	5,889,790	1,094,401	2,183,534	2,704,826	3,952,078	4,484,449	3,978,644	3,911,509

## EXPORTS OF RAW COTTON

Port of Shipment	Quantity in kilos				
	1918	1919	1920	1921	1922
Manoás ..	—	—	359,590	61,834	197,298
Pará ..	93,813	294,148	544,951	1,732,485	2,444,623
Maranhão ..	310,087	891,062	749,869	834,273	893,986
Ilha do Cajueiro ..	50,061	299,177	2,980,464	3,180,060	8,183,851
Fortaleza ..	241,303	1,241,080	612,428	1,891,854	2,600,316
Natal ..	—	167,840	1,802,350	3,035,264	4,545,144
Cabedello ..	—	30,326	3,925,904	3,474,724	5,630,492
Recife ..	1,872,506	1,602,561	556,614	107	45,104
Maceió ..	10,869	16,746	47,593	—	113,858
Bahia ..	—	14,618	—	—	—
Espirito Santo ..	—	—	—	—	—
Rio de Janeiro ..	—	1,477,579	1,948,757	673,094	650,115
Santos ..	13,897	6,002,732	11,269,733	4,736,081	8,553,147
Diversos ..	170	25,186	6,817	4,790	80,961
Total ..	2,594,206	12,158,055	24,696,079	19,006,566	33,947,305

Port of Shipment	Quantity in kilos				
	1923	1924	1925	1926	1927
Manoás ..	—	—	1,486	14,126	—
Pará ..	167,700	143,411	638,312	403,008	317,247
Maranhão ..	258,668	69,977	250,187	210,302	475,197
Ilha do Cajueiro ..	231,065	152,924	75,554	278,444	16,681
Fortaleza ..	4,675,889	1,488,035	4,231,295	3,288,402	1,482,076
Natal ..	1,366,013	386,924	3,469,679	3,476,171	1,727,420
Cabedello ..	3,040,839	1,261,638	6,326,188	4,861,902	3,357,514
Recife ..	3,935,347	2,045,994	5,580,282	3,664,726	3,325,327
Maceió ..	—	—	30	—	—
Bahia ..	—	—	—	—	134,216
Espirito Santo ..	—	—	—	4,211	—
Rio de Janeiro ..	549,471	317,198	592,383	142,076	341,245
Santos ..	4,948,865	594,792	9,469,864	344,149	637,186
Diversos ..	727	3,489	—	—	102,427
Total ..	19,169,584	6,464,382	30,635,260	16,687,017	11,916,536

## BRAZIL—Continued.

Country of Destination	Quantity in kilos				
	1918	1919	1920	1921	1922
Allemanha .. .. .	—	199,074	1,162,958	1,564,654	1,819,965
Argentina .. .. .	—	—	—	—	—
Belgica .. .. .	—	181,925	1,003,304	258,125	758,148
Dinamarca .. .. .	—	—	—	—	—
Estados Unidos .. .. .	48,423	461,099	339,194	790,358	1,203,762
França .. .. .	42,000	4,528,081	8,788,320	3,035,446	6,001,190
Grã-Bretanha .. .. .	1,448,820	4,907,623	9,039,536	10,364,530	17,722,300
Hollanda .. .. .	—	612,311	172,749	—	157,387
Hespanha .. .. .	—	—	—	—	—
Italia .. .. .	—	244,999	96,341	205,030	196,128
Japão .. .. .	—	—	—	—	—
Noruega .. .. .	—	—	—	—	—
Portugal .. .. .	1,040,611	1,015,981	4,066,480	3,287,642	6,035,764
Suecia .. .. .	—	—	—	—	—
Uruguay .. .. .	—	—	—	—	—
Diversos .. .. .	14,344	1,062	27,197	10,781	52,458
Total	2,594,206	12,153,055	24,696,079	19,606,566	33,947,395

Country of Destination	Quantity in kilos				
	1923	1924	1925	1926	1927
Allemanha .. .. .	263,287	57,875	1,204,950	933,698	218,747
Argentina .. .. .	47,781	3,008	—	—	—
Belgica .. .. .	140,037	24,382	283,335	—	—
Dinamarca .. .. .	—	—	24,847	—	—
Estados Unidos .. .. .	906	3,753	30	10,106	145,724
França .. .. .	1,064,332	289,638	4,481,738	617,867	467,095
Grã-Bretanha .. .. .	11,851,801	—	21,805,570	12,722,242	8,832,082
Hollanda .. .. .	195,952	4,287,469	517,511	475,767	735,954
Hespanha .. .. .	—	—	—	—	60,206
Italia .. .. .	21,978	175,304	870	—	—
Japão .. .. .	—	—	—	280	—
Noruega .. .. .	46,793	15,337	—	—	—
Portugal .. .. .	4,605,588	—	2,316,409	1,908,968	1,456,728
Suecia .. .. .	—	—	—	10,145	—
Uruguay .. .. .	22,113	1,606,608	—	7,944	—
Diversos .. .. .	16	1,008	—	—	—
Total	19,169,584	6,464,382	30,635,280	16,687,017	11,916,536

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**INDIA. DETAILED STATEMENT OF THE QUANTITY (IN POUNDS)  
AND THE COUNTS OF YARN SPUN.**

				Nine Months, April to December		
Count or Number				1926	1927	1928
1	..	..	..	4,252,662	7,516,826	2,195,074
2	..	..	..	7,754,282	5,849,505	4,170,901
3	..	..	..	2,238,896	1,700,449	838,360
4	..	..	..	6,337,832	6,668,430	4,145,615
5	..	..	..	1,656,780	2,133,866	1,751,721
6	..	..	..	6,963,876	7,581,457	5,397,053
7	..	..	..	16,506,598	16,941,605	10,338,971
8	..	..	..	8,029,009	8,631,273	4,296,218
9	..	..	..	12,261,792	12,440,430	7,651,147
10	..	..	..	20,820,236	15,226,038	11,089,784
Total, Nos. 1 to 10				86,821,963	84,689,879	51,874,844
11	..	..	..	34,652,901	25,926,594	19,946,512
12	..	..	..	22,943,614	22,438,083	15,105,197
13	..	..	..	19,778,353	20,349,648	16,238,689
14	..	..	..	24,888,212	25,864,208	15,950,626
15	..	..	..	15,433,059	17,578,101	12,108,835
16	..	..	..	24,884,320	25,673,675	19,951,745
17	..	..	..	13,455,219	14,657,912	8,440,507
18	..	..	..	17,139,853	17,803,524	14,831,165
19	..	..	..	11,335,327	11,100,650	9,326,810
20	..	..	..	112,531,357	117,757,507	78,353,582
Total, Nos. 11 to 20				297,042,315	299,149,902	210,253,668
21	..	..	..	43,621,300	46,839,050	30,318,918
22	..	..	..	34,015,945	40,549,324	30,206,545
23	..	..	..	6,644,663	7,410,171	5,595,031
24	..	..	..	38,707,770	43,765,275	26,914,328
25	..	..	..	2,248,095	2,793,194	2,343,123
26	..	..	..	11,780,818	11,080,877	9,223,961
27	..	..	..	4,722,187	4,595,523	2,062,093
28	..	..	..	10,801,657	10,499,859	9,941,080
29	..	..	..	1,836,588	1,738,565	1,622,718
30	..	..	..	31,119,548	32,278,218	29,282,790
Total, Nos. 21 to 30				185,498,571	201,550,056	147,510,587
31	..	..	..	1,365,012	1,114,786	1,598,630
32	..	..	..	8,156,698	9,779,117	10,413,121
33	..	..	..	1,107,615	1,256,508	664,861
34	..	..	..	1,316,571	1,451,342	1,470,263
35	..	..	..	392,681	135,872	101,837
36	..	..	..	1,379,591	2,060,512	917,542
37	..	..	..	695	24,276	183,744
38	..	..	..	192,007	272,189	147,897
39	..	..	..	6,095	—	44,908
40	..	..	..	6,776,381	8,621,469	10,750,256
Total, Nos. 31 to 40				20,693,346	24,680,071	26,293,059
Above 40				8,376,770	8,741,706	7,054,215
Wastes, etc.				2,327,270	4,800,457	4,114,388
GRAND TOTAL				600,760,135	623,612,071	447,100,761

# COTTON TRADE STATISTICS

531

INDIA—*Continued*

DETAILED STATEMENT OF THE QUANTITY (IN POUNDS AND THEIR EQUIVALENT IN YARDS) AND DESCRIPTION OF **WOVEN GOODS** MANUFACTURED.

Description	Nine Months, April to December		
	1926	1927	1928
Grey and bleached piece goods			
Chadaus .. ..	{ lbs. 19,562,944 ..	20,956,133 ..	15,438,784
	{ vds. 52,463,530 ..	53,567,360 ..	42,412,460
Dhutis .. ..	{ lbs. 92,373,050 ..	99,619,631 ..	83,913,709
	{ vds. 445,708,370 ..	474,202,248 ..	409,395,933
Drills and jeans ..	{ lbs. 13,788,216 ..	16,600,781 ..	11,838,610
	{ vds. 54,414,977 ..	95,583,207 ..	48,053,285
Cambrics and lawns ..	{ lbs. 507,773 ..	734,229 ..	638,324
	{ vds. 2,541,566 ..	4,144,110 ..	3,868,728
Printers .. ..	{ lbs. 3,547,648 ..	3,519,164 ..	3,554,053
	{ vds. 15,299,680 ..	15,276,141 ..	16,659,758
Shirtings and longcloth	{ lbs. 102,166,497 ..	108,086,043 ..	71,949,107
	{ vds. 440,822,893 ..	472,362,259 ..	318,468,710
F-cloth, domestic, and sheetings .. ..	{ lbs. 16,766,260 ..	19,374,453 ..	13,352,367
	{ vds. 66,746,972 ..	71,665,815 ..	51,559,311
Tent cloth .. ..	{ lbs. 2,473,124 ..	1,877,300 ..	2,168,080
	{ vds. 5,208,941 ..	4,437,188 ..	5,163,613
Khadi, Dungri or	{ lbs. 27,236,337 ..	33,972,991 ..	22,362,231
Khaddar .. ..	{ vds. 74,313,280 ..	94,380,368 ..	66,487,982
	{ lbs. 8,533,603 ..	7,771,673 ..	5,943,143
Other sorts .. ..	{ vds. 31,174,849 ..	31,691,683 ..	24,321,036
<hr/>			
Total .. ..	{ lbs. 286,955,452 ..	312,512,398 ..	231,158,408
	{ vds. 1,188,695,058 ..	1,287,310,379 ..	986,390,816
<hr/>			
Coloured piece-goods	{ lbs. 107,158,579 ..	113,567,759 ..	68,126,063
	{ vds. 498,297,034 ..	512,814,948 ..	317,410,271
Grey and coloured goods, other than piece goods	{ lbs. 3,137,768 ..	3,093,376 ..	2,120,013
	{ doz. 750,401 ..	700,032 ..	488,788
Hosiery .. ..	{ lbs. 736,539 ..	879,751 ..	1,077,066
	{ doz. 261,538 ..	318,268 ..	320,911
Miscellaneous .. ..	{ lbs. 3,308,593 ..	4,711,448 ..	3,217,222
Cotton goods mixed with silk or wool .. ..	{ lbs. 1,648,174 ..	3,611,990 ..	2,265,746
<hr/>			
GRAND TOTAL	{ lbs. 102,945,105 ..	438,376,722 ..	307,964,518
	{ vds. 1,686,992,092 ..	1,800,125,327 ..	1,303,801,087
	{ doz. 1,011,939 ..	1,018,300 ..	809,699

## JAPAN

## EXPORTS OF GREY CLOTHS BY COUNTRIES

	Striped	Fine Twill Shirtings	Grey Shirtings	Grey Sheetings	T cloths	Imitation Nankeens
Shanghai ..	—	—	260,255	—	—	—
Tientsin ..	—	—	40,000	12,000	—	—
Tsingtao ..	9,021	—	45,210	—	29,760	—
Dairen ..	—	111,832	119,351	7,200	15,632	164,901
Hankow ..	—	—	—	—	—	—
Hong Kong ..	—	95,517	40,000	44,400	97,467	—
Manchuria ..	32,106	433,887	349,325	63,776	47,750	1,515,203
Other China ..	—	—	—	—	5,290	—
India ..	759,674	—	30,261,573	945,910	—	—
Dutch Indies ..	286,565	238,604	4,062,749	621,375	48,437	—
Indo-China ..	—	—	—	—	—	—
Egypt ..	78,624	—	245,507	4,420,860	69,880	—
Other African ..	232,994	996	16,355	1,354,740	—	—
Australia ..	1,875	—	52,690	396,050	37,851	—
Straits Settlements ..	—	—	6,833	—	—	—
Philippine Isles ..	44,328	—	5,400	—	50,850	—
Balkans ..	5,700	—	273,416	204,000	—	—
S. America ..	428,838	—	35,500	346,264	14,748	—
Siam ..	—	—	111,350	—	—	—
Arabia and Persia ..	39,934	—	77,375	2,329,993	—	—
Others ..	24,352	—	5,578	165,350	9,244	—
Unknown ..	—	—	—	—	—	—
Total December ..	1,944,911	880,836	36,017,377	10,920,927	441,768	1,680,104
Since Jan. 1 ..	27,993,046	33,319,057	377,043,940	118,960,300	10,019,893	32,989,252

## EXPORTS OF PRINTED AND DYED CLOTHS BY

	Drills	Fine Twill Shirtings	Shirtings	T cloths	Ducks	Satins	Prints	Flannels	Kokura
Shanghai ..	—	1,051,188	5,479	111,834	—	2,911,050	796,317	286,878	151,254
Tientsin ..	—	154,727	13,067	80,167	—	1,475,079	51,496	6,360	84,222
Tsingtao ..	—	145,494	53,501	27,998	1,205	640,608	34,741	17,032	7,560
Dairen ..	32	196,226	82,987	95,949	3,014	560,135	16,866	32,226	19,026
Hankow ..	—	27,587	4,825	—	—	199,170	43,400	36,555	—
Hong Kong ..	114,333	190,684	65,957	99,116	14,750	1,260,159	73,796	371,948	26,190
Manchuria ..	12,976	624,468	77,457	67,717	59,327	684,491	50,339	214,665	32,072
Other China ..	—	—	—	—	—	—	—	—	—
India ..	801,442	1,634,263	502,946	464,695	1,600	233,952	190,061	88,808	17,309
Dutch Indies ..	996,947	2,927,797	1,018,392	406,289	1,867	1,430,703	292,435	211,966	38,654
Indo-China ..	—	—	—	—	—	—	—	—	—
Egypt ..	2,294,420	—	155,840	—	—	3,391	—	—	—
Other African ..	122,405	149,848	69,886	24,570	—	—	—	285,481	—
Australia ..	19,382	—	4,980	—	—	14,050	—	10,274	20,861
Straits Settlements ..	138,039	260,924	310,641	276,699	6,885	48,620	91,629	13,767	—
Philippine Isles ..	5,768	404,331	374,379	276,699	—	59,343	264,573	367,281	13,500
Balkans ..	—	—	—	—	—	—	—	—	—
S. America ..	104,275	40,229	—	—	—	—	—	602,579	—
Siam ..	17,948	39,750	—	—	—	—	—	—	—
Arabia and Persia ..	78,624	19,404	15,210	—	—	—	58,100	1,462	—
Others ..	313,365	24,635	20,236	—	—	7,456	—	43,247	3,515
Unknown ..	—	—	—	—	—	—	—	—	—
Total December ..	5,014,956	7,891,555	2,775,873	1,931,731	88,648	9,529,118	1,944,053	2,340,529	408,163
Since Jan. 1 ..	50,532,514	120,258,103	49,474,321	30,170,466	970,938	145,312,464	588,193,060	41,363,459	10,689,320

## EXPORTS OF BLEACHED COTTON GOODS BY

	Striped	Fine Twill Shirtings	Sheetings	Shirtings	T cloths	Imitation Nankeens
Shanghai ..	—	—	—	959,001	56	—
Tientsin ..	—	—	—	33,244	—	160
Tsingtao ..	—	—	—	5,250	2,425	2,498
Dairen ..	—	—	—	72,980	14,612	42,546
Hankow ..	—	—	—	160,380	—	—
Hong Kong ..	—	—	—	168,456	—	—
Manchuria ..	—	11,113	—	494,269	1,116	2,802
Other China ..	—	—	—	—	—	—
India ..	—	25,202	89,715	398,041	—	—
Dutch Indies ..	—	72,953	162,712	534,198	—	140,800
Indo-China ..	—	—	—	—	—	—
Egypt ..	—	—	—	47,820	—	—
Other African ..	—	38,866	—	—	—	—
Australia ..	—	—	—	—	—	—
Straits Settlements ..	—	—	14,244	—	38,293	174
Philippine Isles ..	—	—	—	—	145,900	—
Balkans ..	—	—	—	—	—	—
S. America ..	—	—	—	—	—	—
Siam ..	—	—	—	—	65,100	—
Arabia and Persia ..	—	—	—	—	—	—
Others ..	—	3,333	—	—	5,484	1,353
Unknown ..	—	—	—	—	—	—
Total December ..	150,334	277,784	—	3,128,416	18,383	191,849
Since Jan. 1, 1928 ..	1,001,066	5,059,914	311,411	90,290,951	578,367	2,017,465

## DURING DECEMBER, 1928. (In square yards.)

Flannels	Crêpes	Cotton Blankets	Ducks	Others	Total		Since Jan 1, 1928	
					yen	yen	yen	yen
10,193	—	—	1,597	—	281,045	57,670	21,139,815	4,318,735
4,800	—	—	—	2,333	56,133	12,494	21,178,459	4,942,292
800	—	—	1,440	78	87,209	23,216	2,610,753	544,353
38,909	—	—	7,261	8,035	473,121	117,018	20,613,666	4,818,476
—	—	—	—	—	—	—	3,391,874	733,818
—	—	—	43,513	—	320,897	68,173	18,766,146	3,981,248
52,659	—	567	8,545	25,369	2,529,187	647,280	86,826,090	21,219,874
—	—	—	—	—	5,299	1,236	233,448	49,087
—	—	—	18,151	—	31,085,308	5,855,068	260,619,354	46,997,220
470	—	—	433	15,120	5,273,662	999,192	53,713,592	10,250,680
—	—	—	—	—	—	—	27,350	7,893
—	—	—	—	19,900	4,843,771	1,113,874	49,264,890	11,240,765
—	—	—	4,100	—	1,609,185	356,744	15,830,285	3,370,119
—	—	—	610	—	488,986	83,574	6,420,758	983,429
—	—	—	10,916	—	10,265	981,260	—	81,471
—	—	—	195	—	100,773	21,259	2,732,229	508,527
—	—	—	—	—	488,178	91,058	4,199,273	803,894
—	—	—	—	6,640	831,970	185,283	8,437,081	1,814,231
—	—	—	36,718	—	148,068	43,323	1,327,450	302,052
—	—	—	14,389	—	2,461,691	520,313	24,969,385	5,905,870
—	—	—	279	—	204,812	43,583	2,187,608	435,507
—	—	—	—	—	—	—	42,200	7,283
104,800	—	567	148,147	77,475	52,216,912	10,250,632	—	—
3,871,861	3,665	1,330	2,197,390	1,263,204	—	—	607,462,946	123,214,728

## COUNTRIES DURING DECEMBER, 1928. (Square yards.)

Crêpes	Blankets	Imitation Nankeens	Striped	Poplins	Others	Total		Since Jan 1, 1928	
						yen	yen	yen	yen
10,366	71,461	3,750	—	55,860	1,186,840	6,642,286	2,387,981	174,687,260	59,184,263
—	—	112	—	2,100	179,678	2,047,908	802,390	11,622,776	16,452,432
—	818	261	2,739	746	163,422	1,096,215	397,693	15,559,153	4,919,669
—	11,302	21,743	2,266	700	352,419	1,388,791	498,197	27,547,513	9,018,777
—	18,400	—	—	—	46,681	376,618	138,101	19,240,734	6,828,673
2,424	38,378	—	361,890	89,402	298,549	2,807,576	905,250	43,669,170	12,105,116
—	6,942	4,025	179,802	700	1,572,858	3,587,934	1,815,678	58,896,802	20,289,738
—	—	—	—	—	—	—	—	218,653	77,271
509,084	—	9,804	1,179,051	24,245	181,222	5,788,482	1,397,319	89,211,298	21,550,875
67,635	527,906	3,375	2,498,078	50,132	202,789	10,675,865	2,697,963	109,707,789	27,200,351
—	—	—	—	—	—	—	—	68,425	16,660
101,074	—	—	1,085,328	—	—	3,640,054	807,863	27,598,326	6,236,193
490,202	2,872	—	370,382	—	1,960	1,517,006	334,266	12,330,395	2,839,236
195,720	—	—	33,248	—	—	298,515	68,219	4,645,984	1,103,579
2,988	37,914	—	188,137	87,410	17,910	1,076,563	317,672	13,841,329	2,987,802
37,705	9,100	63,570	32,954	67,619	22,517	1,999,339	437,002	24,677,966	5,406,267
—	—	—	31,500	—	—	31,500	6,354	295,682	66,133
191,140	—	—	49,350	—	—	987,573	235,827	6,086,679	1,650,344
4,980	—	—	30,060	—	16,643	109,381	28,252	4,406,604	912,672
—	12,712	—	181,009	—	—	346,821	80,545	2,599,309	620,400
399,111	2,002	440	52,084	—	—	374,296	201,627	8,036,682	1,884,056
—	—	—	—	—	—	—	—	—	—
2,012,428	739,807	107,080	6,278,778	378,914	4,251,588	45,693,223	12,058,815	—	—
23,304,429	10,490,197	3,507,268	80,681,499	6,546,973	54,596,918	—	—	695,091,929	201,350,331

## COUNTRIES DURING DECEMBER, 1928. (In square yards.)

Kokura	Crêpes	Flannels	Others	Total		Since Jan. 1, 1928	
				yen	yen	yen	yen
—	1,660	437	—	961,154	237,005	39,682,753	9,777,714
—	—	1,800	—	15,204	7,395	10,916,794	2,614,871
—	—	478	—	11,506	2,188	2,907,919	718,045
—	—	9,556	17,711	157,405	34,864	5,374,056	1,185,541
—	—	—	—	160,390	38,955	8,003,453	1,954,321
—	—	21,794	—	190,250	43,310	6,983,013	1,562,441
—	—	20,170	1,331	590,801	139,362	15,283,837	3,619,534
—	—	—	—	—	—	81,143	19,232
—	188,504	14,883	—	726,435	145,908	7,215,767	1,512,559
—	18,666	7,125	31,500	967,934	233,116	7,928,486	1,832,212
—	—	—	—	—	—	3,149	740
—	2,250	—	—	50,070	11,608	739,133	155,847
—	329,694	25,006	—	397,566	89,904	1,590,040	364,499
—	31,315	2,880	2,907	36,802	7,791	1,325,677	318,301
—	14,100	1,367	7,012	76,880	17,091	606,617	137,006
—	5,247	—	15,989	167,136	28,352	3,544,934	882,450
—	—	—	—	—	—	1,370	554
—	81,307	223,181	—	304,488	79,063	1,533,221	361,248
—	8,333	—	—	73,433	17,368	587,123	137,880
—	—	—	—	3,333	954	108,537	24,928
—	137,994	—	—	144,831	27,467	1,450,876	291,016
—	—	—	—	—	—	11,966	1,950
—	819,160	328,337	77,345	4,991,603	1,161,701	—	—
1,050,910	10,394,392	2,970,467	2,205,421	—	—	115,880,364	27,497,919

# U.S.A. EXPORTS OF COTTON MANUFACTURES FOR TWELVE MONTHS ENDED DECEMBER, 1928.

Articles and Countries to which exported	Unit of Quantity	Twelve months ending December			
		1926		1927	
		Quantity	Value	Quantity	Value
TEXTILES (Total)		—	\$1,021,356,596	—	\$1,124,495,467
COTTON UNMANUFACTURED			\$		\$
	{ bale lb	{ 9,477,744 4,897,062,097	{ 826,306,045	{ 8,732,863 4,579,426,432	{ 920,008,963
Lint cotton	{ bale lb	{ 9,198,746 4,739,823,481	{ 818,218,064	{ 8,546,419 4,471,842,390	{ 912,848,839
Long staple (1½ in. or over)	{ bale lb	{ 1,506 776,363	{ 339,682	{ 689 356,086	{ 145,391
Sea Island	{ bale lb	{ 1,193,939 621,860,579	{ 112,401,869	{ 1,104,399 579,210,729	{ 123,151,362
Other	{ bale lb	{ 8,003,301 4,117,186,539	{ 705,576,513	{ 7,441,331 3,892,275,575	{ 789,552,086
Short staple (under 1½ in.)	{ bale lb	{ 253,973 131,972,594	{ 23,424,904	{ 202,723 103,396,500	{ 22,168,845
Belgium	{ bale lb	{ 11,900 6,450,831	{ 1,190,541	{ 13,732 7,483,448	{ 1,548,460
Finland	{ bale lb	{ 918,098 482,882,644	{ 92,753,749	{ 819,137 433,050,730	{ 90,836,420
France	{ bale lb	{ 2,452,472 1,264,055,098	{ 226,048,122	{ 2,037,872 1,070,830,195	{ 217,890,995
Germany	{ bale lb	{ 666,308 345,838,141	{ 60,550,331	{ 737,505 386,227,903	{ 78,833,695
Italy	{ bale lb	{ 125,097 66,269,326	{ 12,154,871	{ 162,388 86,832,611	{ 18,209,009
Netherlands	{ bale lb	{ 4,140 2,169,175	{ 382,890	{ 4,260 2,246,985	{ 451,296
Norway	{ bale lb	{ 26,966 14,301,007	{ 2,688,008	{ 40,979 22,251,000	{ 4,555,083
Portugal	{ bale lb	{ 474,900 247,363,861	{ 39,225,554	{ 429,893 223,481,836	{ 44,536,918
Soviet Russia in Europe	{ bale lb	{ 312,833 165,317,198	{ 29,702,006	{ 314,264 169,205,681	{ 34,416,749
Spain	{ bale lb	{ 58,082 30,636,892	{ 5,252,092	{ 55,084 29,297,469	{ 5,827,568
Sweden	{ bale lb	{ 1,950 1,046,434	{ 194,336	{ 4,050 2,151,813	{ 450,346
Switzerland	{ bale lb	{ 1,648,175 840,125,602	{ 138,935,815	{ 1,997,395 1,030,776,656	{ 211,399,073
United Kingdom	{ bale lb	{ 50,908 26,873,835	{ 5,138,806	{ 29,566 15,828,823	{ 3,340,520
Other Europe	{ bale lb	{ 244,369 123,939,595	{ 20,363,576	{ 234,103 120,428,678	{ 24,218,700
Canada	{ bale lb	{ 261,847 120,740,650	{ 17,764,130	{ 63,780 33,680,256	{ 6,084,464
British India	{ bale lb	{ 242,705 122,497,058	{ 19,076,087	{ 170,067 88,908,618	{ 17,712,632
China, Hong Kong and Kwantung	{ bale lb	{ 1,437,453 734,986,805	{ 122,921,647	{ 1,225,473 641,571,769	{ 129,272,021
Japan	{ bale lb	{ 6,570 3,356,735	{ 549,999	{ 4,648 4,191,719	{ 494,043
Other countries	{ bale lb	{ 278,998 157,238,616	{ 7,987,981	{ 186,444 107,584,042	{ 7,160,124
Linters	{ bale lb	{ 140,469,855	{ 23,996,780	{ 109,657,911	{ 24,232,829
Cotton semi-manufactures (total)	lb.	96,521,824	8,650,662	63,388,630	7,117,012
Cotton mill waste	lb.	15,407,476	1,022,294	19,198,924	1,428,357
Cotton rags, except paper stock	"	—	—	449,995	76,586
Cotton batting, carded cotton and roving	"	17,495,517	5,723,516	13,159,500	4,887,313
Cotton yarn:					
Carded yarn, not combed	"	372,070	124,769	200,321	80,367
Europe	"	854,006	378,308	598,749	259,085
Canada	"	316,477	105,788	260,674	93,120
Salvador	"	615,513	156,065	247,429	71,785
Newfoundland & Labrador	"	11,835,699	3,795,120	8,837,911	3,135,542
Argentina	"	853,155	273,262	1,060,381	375,858
Chile	"	598,758	179,105	509,609	171,237
Colombia	"	1,162,532	357,111	1,004,617	347,591
Uruguay	"	93,280	60,151	192,436	88,370
Other South America	"	794,027	293,837	696,873	264,358
Other countries	"				

## U.S.A. EXPORTS—Continued.

Articles and Countries to which exported	Unit of Quantity	Twelve months ending December			
		1927		1928	
		Quantity	Value	Quantity	Value
Combed yarn .. .. .	lb.	11,045,038	\$ 8,600,308	13,460,892	\$ 10,723,561
Mercerised .. .. .	"	8,572,708	7,409,758	11,098,006	9,490,195
Not mercerised .. .. .	"	2,472,330	1,190,550	2,362,886	1,233,366
United Kingdom .. .. .	"	835,043	795,959	1,262,139	1,138,676
Canada .. .. .	"	2,051,612	1,668,185	2,301,568	1,971,479
Mexico .. .. .	"	405,734	276,882	461,506	406,381
Argentina .. .. .	"	3,939,855	3,110,552	4,520,913	3,519,900
Brazil .. .. .	"	1,244,849	1,165,382	1,316,389	1,222,730
Chile .. .. .	"	306,562	212,132	414,576	312,786
Uruguay .. .. .	"	337,642	265,818	284,654	235,545
Other South America .. .. .	"	496,116	196,654	588,368	251,819
Australia .. .. .	"	1,014,627	701,393	1,534,122	1,165,659
Other countries .. .. .	"	412,998	207,351	746,267	499,086
Cotton manufactures (total) .. .. .	—	—	109,189,321	—	110,418,514
Cotton thread and cordage :					
Sewing thread .. .. .	lb.	1,237,203	1,128,127	1,030,668	1,023,236
Crochet, darning and embroidery cotton .. .. .	"	136,430	157,431	144,395	162,321
Twine and cordage .. .. .	"	4,549,564	1,604,128	3,754,838	1,490,599
Cotton cloth, duck and tire fabric .. .. .	sq. yd.	565,020,728	76,755,711	546,893,310	79,295,528
Tire fabric .. .. .	"	—	—	—	—
Cord .. .. .	"	3,453,548	1,406,469	4,742,057	2,112,780
Other .. .. .	"	1,524,503	393,183	1,068,438	523,971
Cotton duck .. .. .	"	15,161,436	4,740,295	13,846,669	4,776,690
Heavy filter, paper dryer, hose and belting duck .. .. .	"	—	—	639,518	451,457
Unbleached (grey) .. .. .	"	—	—	—	—
Ounce .. .. .	"	5,997,631	1,635,946	5,162,357	1,487,719
Numbered .. .. .	"	5,929,664	2,120,545	4,742,641	1,827,813
Bleached .. .. .	"	1,926,711	610,132	1,935,005	558,324
Coloured .. .. .	"	1,307,430	373,672	1,367,148	451,377
Cotton cloth, unbleached (grey) .. .. .	"	125,718,833	11,355,802	124,260,593	11,710,911
Drills and twills .. .. .	"	—	—	13,431,401	1,664,138
Sheetings, 40 in. and under .. .. .	"	—	—	73,485,032	6,585,943
Sheetings, over 40 in. .. .. .	"	—	—	1,627,949	190,725
Osnaburgs .. .. .	"	—	—	20,241,731	2,081,196
All other unbleached .. .. .	"	—	—	15,474,480	1,188,900
Greece .. .. .	"	3,269,084	373,026	1,217,778	158,951
Other Europe .. .. .	"	2,887,304	301,848	2,340,088	312,704
Canada .. .. .	"	14,017,096	1,345,058	22,700,941	1,998,551
Salvador .. .. .	"	6,418,618	533,714	5,748,602	491,741
Other Central America .. .. .	"	13,471,568	1,236,048	11,208,311	1,056,888
Mexico .. .. .	"	244,755	36,060	460,185	54,648
Jamaica .. .. .	"	5,700,204	426,730	3,202,888	251,155
Cuba .. .. .	"	8,608,702	570,388	7,956,620	650,181
Dominican Republic .. .. .	"	2,591,750	233,481	1,639,147	164,257
Haiti, Republic of .. .. .	"	5,649,902	461,565	5,306,960	422,170
Other W. Indies and Bermudas .. .. .	"	1,114,081	98,021	675,216	69,618
Argentina .. .. .	"	3,865,640	385,553	2,646,744	261,838
Bolivia .. .. .	"	5,816,814	559,589	4,993,558	496,968
Chile .. .. .	"	17,059,797	1,595,830	14,118,656	1,456,638
Colombia .. .. .	"	8,302,165	778,234	10,695,986	1,084,359
Peru .. .. .	"	756,270	75,581	813,149	91,585
Venezuela .. .. .	"	464,427	44,510	520,247	58,788
Other South America .. .. .	"	4,300,341	401,707	3,717,109	328,424
Aden .. .. .	"	3,802,295	264,148	3,906,081	254,750
British India .. .. .	"	2,953,948	290,396	1,710,197	192,277
Philippine Islands .. .. .	"	4,916,628	492,527	7,995,162	738,342
Oceania .. .. .	"	1,672,690	170,030	1,050,724	144,260
British Africa .. .. .	"	4,850,260	351,883	6,188,146	478,408
Other countries .. .. .	"	2,984,494	329,875	3,448,098	443,460
Cotton cloth, bleached .. .. .	"	87,300,900	9,983,581	96,230,463	11,096,116
40 in. wide and under .. .. .	"	—	—	90,199,700	10,226,073
Over 40 in. wide .. .. .	"	—	—	6,030,763	870,043

## U.S.A. EXPORTS—Continued.

Articles and Countries to which exported	Unit of Quantity	Twelve months ending December			
		1927		1928	
		Quantity	Value	Quantity	Value
Europe .. .. .	sq. yd.	662,034	\$ 120,015	684,250	\$ 110,799
Canada .. .. .	"	20,510,923	1,494,130	17,087,255	1,271,725
Central America .. .. .	"	5,335,390	681,425	4,766,877	568,328
Mexico .. .. .	"	2,748,458	414,589	2,410,328	363,128
Cuba .. .. .	"	17,533,216	2,019,638	15,341,160	1,751,924
Dominican Republic .. .. .	"	2,525,451	308,443	1,690,388	202,086
Haiti, Republic of .. .. .	"	1,818,548	222,872	2,269,899	263,349
Other W. Indies and Bermudas .. .. .	"	1,497,501	202,948	847,500	106,046
Argentina .. .. .	"	2,285,661	361,880	2,299,473	352,056
Chile .. .. .	"	667,720	78,769	1,016,240	154,117
Colombia .. .. .	"	1,692,325	237,700	1,481,713	228,901
Peru .. .. .	"	378,285	50,263	489,964	70,129
Other South America .. .. .	"	1,780,942	241,449	2,527,344	319,159
Philippine Islands .. .. .	"	25,188,879	3,056,880	40,325,444	4,908,855
Other countries .. .. .	"	2,660,767	492,582	2,092,628	445,523
Cotton cloth, coloured .. .. .	"	331,861,508	48,876,381	306,115,090	49,075,000
Voiles .. .. .	"	—	—	46,020,214	7,326,956
Percales and prints, 32 in. and narrower .. .. .	"	—	—	33,521,501	3,548,621
Percales and prints, over 32 in. wide .. .. .	"	—	—	11,863,392	1,577,069
Flannels and flannelettes .. .. .	"	—	—	4,898,333	728,338
Khaki and fustians .. .. .	"	—	—	4,341,337	876,348
Denims .. .. .	"	—	—	14,606,147	2,857,331
Suitings (drills, etc.) .. .. .	"	—	—	27,322,724	4,618,424
Ginghams .. .. .	"	—	—	13,324,215	1,511,788
Chambrays .. .. .	"	—	—	12,338,530	1,372,436
All other printed fabrics .. .. .	"	—	—	40,911,903	7,314,857
All other piece-dyed fabrics .. .. .	"	—	—	58,680,722	9,470,340
All other yarn-dyed fabrics .. .. .	"	—	—	23,309,135	3,714,871
Cotton and rayon mixtures (cotton chief value) .. .. .	"	—	—	15,076,939	4,157,644
Other cotton fabrics .. .. .	"	—	—	—	—
Blankets .. .. .	lb.	1,583,493	923,766	1,485,436	819,811
Damasks .. .. .	sq. yd.	371,649	97,925	779,687	212,877
Pile fabrics, plushes, velveteens and corduroys .. .. .	"	589,523	346,140	634,973	512,743
Tapestries and other upholstery goods .. .. .	"	77,658	112,435	431,870	258,414
Cotton fabrics sold by the lb. .. .. .	lb.	3,709,460	1,502,882	9,003,965	3,337,259
Cotton wearing apparel .. .. .	"	—	15,770,002	—	14,337,851
Knit goods : .. .. .	"	—	—	—	—
Gloves .. .. .	doz. prs.	149,753	211,734	88,300	157,882
Hosiery .. .. .	"	4,347,435	7,320,505	3,875,417	6,728,216
Women's .. .. .	"	—	—	2,031,407	3,700,881
Children's .. .. .	"	—	—	714,818	1,125,265
Men's socks .. .. .	"	—	—	1,129,192	1,902,070
United Kingdom .. .. .	"	417,736	522,123	275,411	143,140
Other Europe .. .. .	"	250,533	346,270	322,300	753,101
Canada .. .. .	"	481,586	737,590	732,743	782,223
Central America .. .. .	"	287,322	520,763	333,884	504,372
Mexico .. .. .	"	187,283	391,803	75,283	174,767
British W. Indies and Bermudas .. .. .	"	144,221	220,333	128,625	190,932
Cuba .. .. .	"	841,006	1,241,911	699,700	1,061,126
Dominican Republic .. .. .	"	139,026	204,505	90,182	136,865
Argentina .. .. .	"	116,352	274,966	40,260	103,340
Chile .. .. .	"	135,047	260,581	61,328	113,496
Colombia .. .. .	"	176,806	354,513	318,530	608,916
Peru .. .. .	"	215,779	357,592	180,103	235,589
Uruguay .. .. .	"	81,645	119,647	58,239	100,465
Venezuela .. .. .	"	111,137	191,157	137,398	239,897
Other South America .. .. .	"	138,646	194,475	133,187	196,704
British India .. .. .	"	51,836	132,796	36,532	93,519
Philippine Islands .. .. .	"	125,369	224,970	122,545	229,087
Australia .. .. .	"	104,297	190,711	14,486	41,427
British South Africa .. .. .	"	116,677	215,228	90,641	173,034
Other countries .. .. .	"	214,931	427,571	252,031	456,211

## U.S.A. EXPORTS—Continued.

Articles and Countries to which exported	Unit of Quantity	Twelve months ending December			
		1927		1928	
		Quantity	Value	Quantity	Value
Underwear . . . . .	doz	663,200	\$ 2,540,531	583,244	\$ 2,107,107
Sweaters, shawls and other knit outerwear . . . . .	No	509,307	412,378	506,463	461,874
Other wearing apparel . . . . .					
Collars and cuffs . . . . .	doz.	356,226	524,524	287,356	424,725
Cotton overalls, breeches and pants . . . . .		12,715	166,026	33,255	421,077
Underwear, not knit . . . . .		162,324	749,886	120,438	580,636
Shirts . . . . .		209,559	1,987,968	184,278	1,768,983
Dresses, skirts and waists . . . . .	No.	208,548	228,847	455,649	511,341
Other cotton clothing . . . . .	—	—	1,618,603	—	1,176,010
Other cotton manufactures . . . . .					
Handkerchiefs . . . . .	doz	225,367	143,296	237,962	155,849
Laces, embroideries and lace win- dow curtains . . . . .	yd	6,405,536	216,155	5,431,426	210,820
Cotton belting for machinery . . . . .	lb.	521,266	320,943	478,097	285,397
Cotton bags . . . . .		6,575,005	1,393,643	9,253,520	2,064,873
Quilts, comforts, counterpanes and bedspreads . . . . .	No	87,589	136,891	193,898	275,459
Bed sheets, pillow, bolster and mattress cases . . . . .	doz	24,486	172,327	29,326	218,128
Fowels, bath mats and wash cloths . . . . .		485,432	898,529	783,620	1,097,330
Other cotton manufactures, n. e. s. . . . .	—	—	7,248,220	—	4,060,019

U.S.A. IMPORTS OF COTTON AND COTTON MANUFACTURES  
FOR TWELVE MONTHS ENDED DECEMBER, 1928.

Articles and Countries from which imported	Unit of Quantity	Twelve months ending December			
		1927		1928	
		Quantity	Value	Quantity	Value
TEXTILES . . . . .	—	—	\$ 954,453,347	—	\$ 919,917,775
COTTON, UNMANUFACTURED . . . . .	lb.	205,608,762	45,668,726	172,037,105	42,797,428
Long staple . . . . .	tree	69,579,809	19,624,249	42,655,145	14,177,698
Short staple . . . . .	tree	136,028,953	26,044,477	129,381,960	28,619,730
United Kingdom . . . . .		13,387,870	4,688,224	8,598,374	3,225,562
Mexico . . . . .		21,653,194	2,940,750	22,168,784	4,141,899
Peru . . . . .		11,291,958	2,278,253	8,086,106	1,925,192
British India . . . . .		11,967,500	1,613,678	13,619,753	2,129,244
China and Hong Kong . . . . .		22,510,414	3,820,976	28,304,970	5,070,244
Egypt . . . . .		122,775,866	30,007,738	89,231,492	25,810,956
Other countries . . . . .		2,021,960	319,107	2,027,626	494,331
COTTON, SEMI-MANUFACTURES . . . . .	—	—	5,397,466	—	6,922,630
Cotton waste . . . . .	tree	24,729,741	1,622,772	48,168,091	3,011,776
Yarns and warps . . . . .	lb.				
Not bleached, dyed, coloured, etc. . . . .	cut	34,079	21,764	19,581	20,993
Bleached, dyed, coloured, combed or phed . . . . .	cut	3,270,658	3,752,930	2,576,913	3,289,861
COTTON MANUFACTURES . . . . .	—	—	60,800,384	—	62,971,070
Sewing thread, crochet, darning, em- broidery and knitting cotton . . . . .	yd	2,137,653,931	1,961,519	1,777,315,226	1,482,149
Cotton cloth . . . . .	sq yd	63,002,117	15,596,037	61,293,850	15,839,740
Not bleached, etc. . . . .	cut	27,451,062	5,155,708	23,514,763	4,752,518
Czecho-Slovakia . . . . .		913,322	147,385	1,181,991	216,620
Switzerland . . . . .		1,232,570	179,312	958,392	163,312
United Kingdom . . . . .		25,080,974	4,791,208	21,121,053	4,323,269
Other countries . . . . .		224,296	37,803	253,327	49,317

## U.S.A. IMPORTS—Continued.

Articles and Countries from which imported	Unit of Quantity	Twelve months ending December			
		1927		1928	
		Quantity	Value	Quantity	Value
Bleached .. .. .	sq. yd.	10,146,429	\$ 2,154,285	11,302,175	\$ 2,406,504
Germany .. .. .	"	55,375	21,699	56,818	51,565
Switzerland .. .. .	"	6,281,491	1,044,845	7,124,637	1,073,056
United Kingdom .. .. .	"	3,297,932	1,016,879	3,755,795	1,219,465
Japan .. .. .	"	356,634	29,634	186,541	23,005
Other countries .. .. .	"	154,997	41,228	178,384	39,413
Printed, dyed, coloured or woven figured .. .. .	sq. yd.	25,404,626	8,286,044	26,476,912	8,680,718
Czecho-Slovakia .. .. .	"	3,282,767	812,047	3,887,238	1,036,442
France .. .. .	"	2,207,965	1,016,670	2,218,350	1,098,266
Germany .. .. .	"	1,662,445	424,451	1,358,664	416,142
Switzerland .. .. .	"	3,936,143	838,454	5,462,858	1,065,960
United Kingdom .. .. .	"	12,470,011	4,741,534	11,360,530	4,447,791
Japan .. .. .	"	1,400,821	218,861	1,475,569	229,032
Other countries .. .. .	"	444,474	234,027	713,703	387,085
Cotton fabrics, n. e. s. .. .. .	—	—	9,135,786	—	9,118,726
Damask and manufactures .. .. .	doz.	—	302,220	—	275,689
Pile fabrics and manufactures .. .. .	doz.	—	2,796,051	—	—
Velvets and velveteens .. .. .	sq. yd.	—	—	3,550,213	2,749,641
Other pile fabrics and manu- factures, including ribbons .. .. .	—	—	—	—	427,392
Tapestries and other Jacquard- woven upholstery cloths .. .. .	doz.	—	5,467,679	—	5,068,301
Blankets .. .. .	No.	699,080	300,455	496,724	277,649
Table covers, napkins, doilies, etc., .. .. .	doz.	—	269,381	—	320,054
Wearing apparel .. .. .	—	—	13,901,266	—	16,985,426
Product of the Philippine Islands free .. .. .	—	—	3,521,178	—	3,639,278
Knit goods .. .. .	—	—	—	—	—
Gloves .. .. .	doz. prs.	2,189,618	6,543,620	2,493,596	8,229,690
Hosiery .. .. .	doz.	527,909	1,793,428	796,508	2,593,261
Underwear and other knit goods .. .. .	doz.	163,263	430,686	83,545	374,518
Wearing apparel wholly or partly of lace or embroidered, beaded, etc., .. .. .	doz.	—	716,999	—	750,289
All other wearing apparel .. .. .	doz.	—	895,357	—	1,398,390
Other cotton manufactures .. .. .	—	—	20,205,776	—	19,545,029
Handkerchiefs and mufflers: Not of lace or embroidered, etc., .. .. .	lb.	227,636	680,735	198,875	625,865
Lace-trimmed or embroidered, etc., .. .. .	—	346,584	1,302,290	405,536	1,193,602
Laces, embroideries, etc., .. .. .	—	—	12,475,957	—	11,252,110
Product of the Philippine Islands free .. .. .	—	—	361,449	—	466,687
Hand-made laces .. .. .	doz.	—	1,265,884	—	719,395
Machine-made laces .. .. .	doz.	—	4,924,560	—	4,431,949
France .. .. .	—	—	3,019,857	—	2,828,249
Germany .. .. .	—	—	1,095,852	—	951,947
Switzerland .. .. .	—	—	98,505	—	90,443
United Kingdom .. .. .	—	—	439,814	—	282,657
Other countries .. .. .	—	—	270,532	—	278,653
Articles in part of lace .. .. .	doz.	—	1,378,766	—	1,474,008
Nets, netting, veils and veilings .. .. .	doz.	—	1,403,196	—	1,721,591
Lace window curtains .. .. .	sq. yd.	2,338,179	667,564	1,857,595	515,011
Embroideries .. .. .	doz.	—	637,445	—	647,121
All other laces, embroideries, etc., .. .. .	doz.	—	1,837,093	—	1,276,348
Other cotton manufactures, n. e. s., .. .. .	doz.	—	5,746,794	—	6,473,452

## ENGLAND.

## COTTON YARN AND CLOTH EXPORTS

	COTTON YARN (in lbs.) 000's omitted.			COTTON MANUFACTURES (In sq. yds.) 000's omitted		
	1929	1928	1913	1929	1928	1913*
January .. ..	16,924	14,894	19,093	379,342	337,406	648,913
February .. ..	13,707	14,491	16,761	326,070	316,200	563,606
March .. ..	13,536	15,504	17,213	333,971	397,363	560,905
April .. ..	—	13,753	18,579	—	314,773	587,553
May .. ..	—	14,067	17,777	—	288,935	606,254
June .. ..	—	14,371	16,987	—	277,912	615,558
July .. ..	—	11,375	16,620	—	338,592	638,971
August .. ..	—	15,773	15,998	—	341,285	579,547
September .. ..	—	11,245	15,734	—	298,228	548,973
October .. ..	—	15,148	19,959	—	334,004	630,937
November .. ..	—	15,431	18,248	—	331,395	563,650
December .. ..	—	13,161	17,207	—	290,499	530,692
Grand Total ..	—	169,213	210,176	—	3,866,592	7,075,558
Value, Sterling	—	£22,566	£15,006	—	£107,300	£97,776

\* 1913 Figures in linear yards.

## GERMANY.

## EXPORTS OF COTTON CLOTH FOR YEAR 1928.

(In double zentners.)

Great Britain .....	30,848	Denmark .....	10,812
Czecho-Slovakia .....	727	Sweden .....	5,765
France .....	205	British South Africa ..	8,179
Elsass .....	11	British West Africa ....	4,377
Austria .....	5,939	British East Africa ....	1,619
Switzerland .....	6,752	Portuguese East Africa ..	3,558
Holland .....	14,449	Portuguese West Africa ..	5,390
Belgium .....	1,304	British India .....	4,054
Italy .....	1,530	China .....	12,229
Estonia .....	356	U.S.A. ....	13,855
Hungary .....	3,284	Argentina .....	9,488
Roumania .....	5,379		
Turkey .....	9,829	Total .....	220,028
Norway .....	4,252		

## BOOKS RECEIVED.

"COTON ET CULTURE COTONNIERE," Vol. 3, No. 3, December 1928.

"ASSOCIATION COTONNIERE COLONIAL," Rep No. 86, April, 1929.

"FINANCIAL, COMMERCIAL AND ECONOMIC CONDITIONS IN BRAZIL." 3s. 6d., H.M. Stationery Office, London.

"ECONOMIC CONDITIONS IN THE REPUBLIC OF NICARAGUA AND GUATEMALA." 1s. 6d., H.M. Stationery Office, London.

"ECONOMIC CONDITIONS IN THE DOMINICAN REPUBLIC AND IN THE REPUBLIC OF HAYTI." 1s., H.M. Stationery Office, London.

"ECONOMIC CONDITIONS IN SIAM." 1s. 6d., H.M. Stationery Office, London.

"ECONOMIC AND FINANCIAL CONDITIONS IN SWITZERLAND." 1s. 6d., H.M. Stationery Office, London.

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## Reviews on Current Cotton Literature.

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"SHIRLEY INSTITUTE MEMOIRS," Vol. VII, 1928 (126 pages) has just been published, and deals with the following subjects: The loss of strength of cotton exposed to light; the effect of structure and of bleaching on the strength of cotton yarns; the influence of humidity on the elastic properties of starch film; the chemical analysis of cotton; the determination of cellulose; the tension in a single warp thread during plain weaving; the tensile strength of chemically modified cotton, etc.

"THE EMPIRE COTTON GROWING REVIEW" for April contains articles on "Cotton Growing in Ceylon," "The Blackarm Disease of Cotton," "Cotton Diseases in Uganda," etc.

"PROSPETTIVE ECONOMICHE FOR 1929," by Giorgio Mortara, gives a review of the world's cotton industry, and the Italian industry in particular. The author gives useful statistics of cotton production, cotton exports and imports, yarn and cloth exports, prices of cotton, etc., going in many cases back to 1913. This annual is published by the University of Milan at Lire 40.

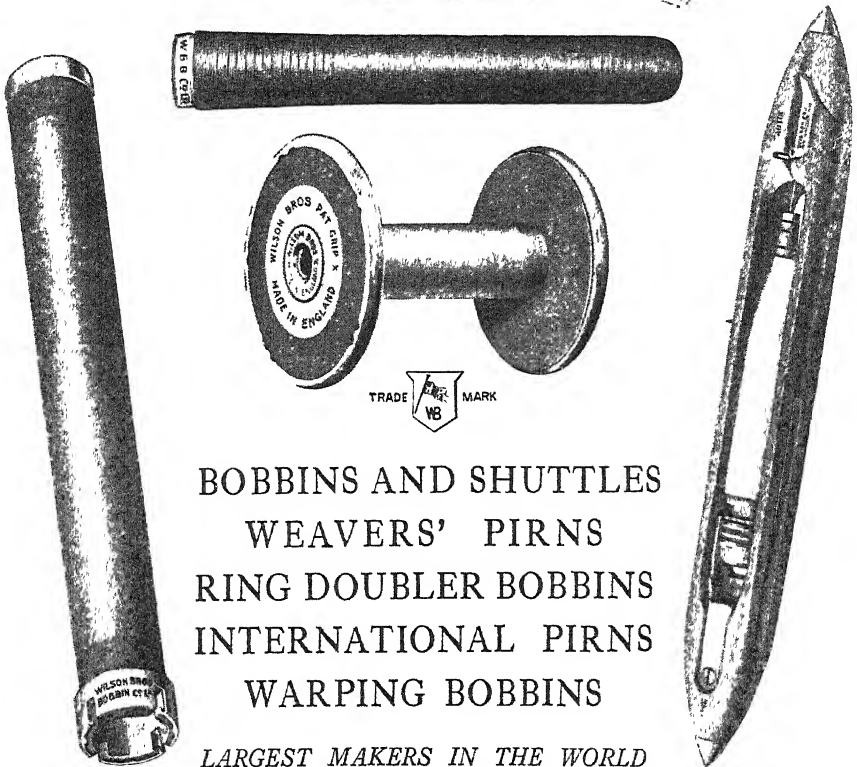
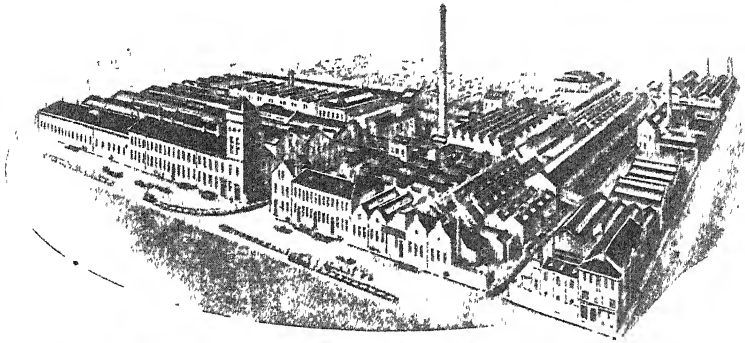
"REPORTS RECEIVED FROM EXPERIMENT STATIONS, 1927-28" (Empire Cotton Growing Corporation, 277 pages, 2s. 6d.). As the title of this publication infers, this book is a record of the reports received from the cotton experimental stations supported by the Empire Cotton Growing Corporation. These reports should appeal to all who are interested in cotton growing. Reports showing the progress of cotton growing are published from Queensland, South Africa, Swaziland, Rhodesia, Sudan, Uganda, Nyasaland, Nigeria and Fiji.

"GACETA ALGODONERA." The annual review of this publication usually contains some interesting articles on cotton cultivation in the Argentine, and this year's issue is no exception. The present issue contains articles dealing with the transportation of cotton; cotton growing; cotton ginning; cotton-seed pressing; cotton pests; results of the cotton experimental stations, etc.

"REVUE ECONOMIQUE INTERNATIONALE" for January contains an article on the cotton industry of U.S.A., by Comte Jean de Hemptinne. The author describes the problems of capital and labour in the U.S. cotton industry, and points out the errors of the European cotton industrialists; he also shows the causes of the progress and success in U.S.A.

"THE SILK AND RAYON DIRECTORY AND BUYERS' GUIDE, 1929." Published by John Heywood Ltd., Manchester, at 21s. The present issue is the fourth edition, and contains three times the information of the first volume. This directory contains the names of every silk and rayon manufacturer in Great Britain. Other useful information is a list of trade names of silk and rayon yarns and cloth, a glossary of rayon terms, etc.

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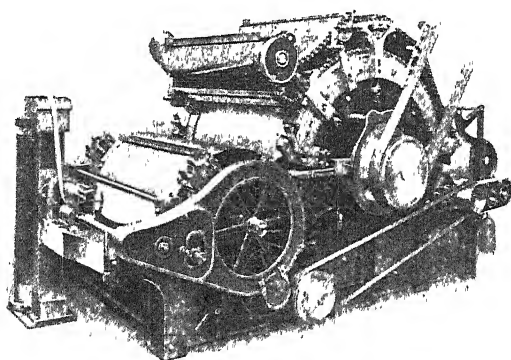
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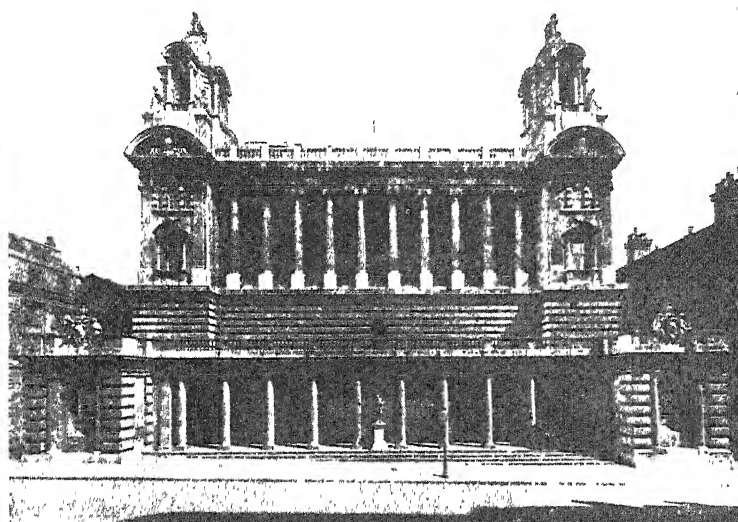
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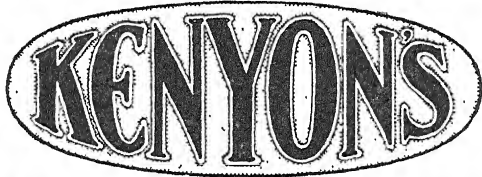
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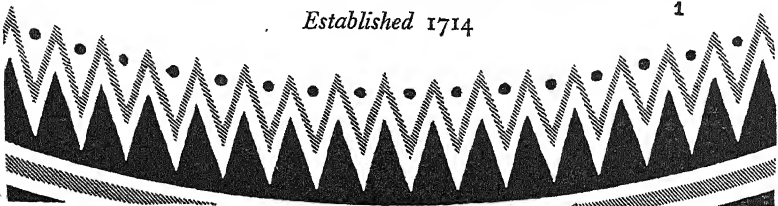
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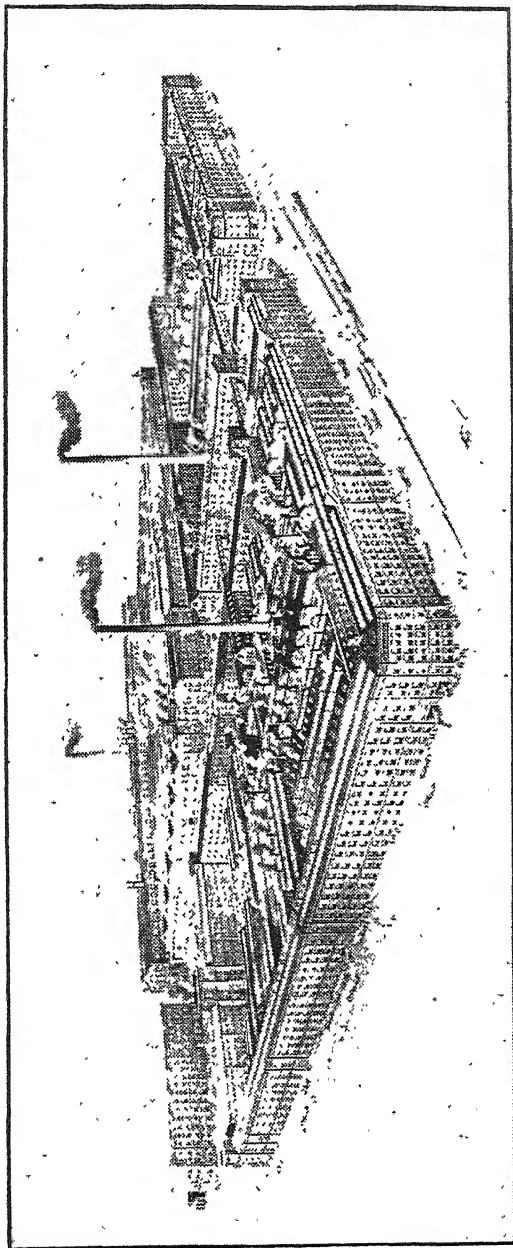
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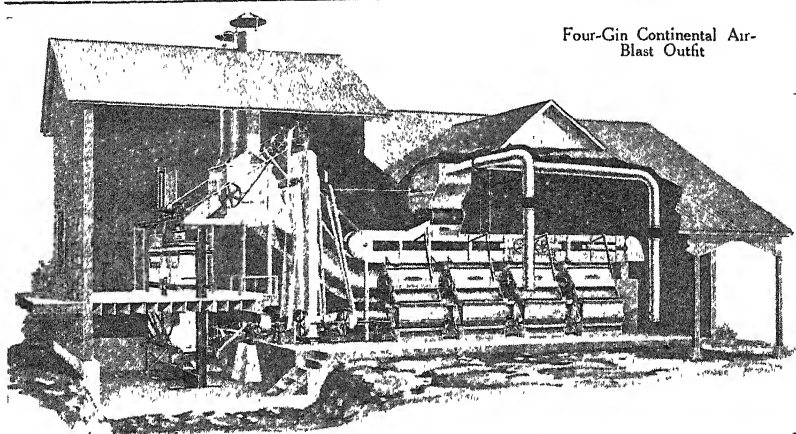
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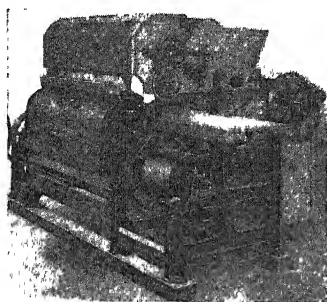
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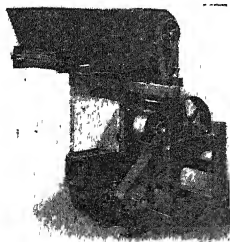
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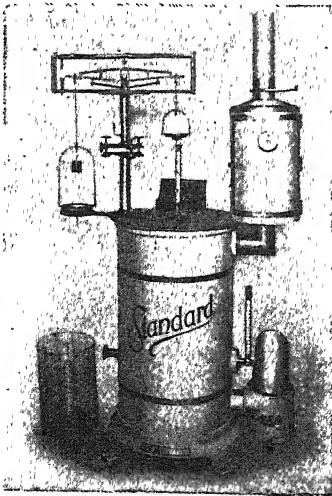
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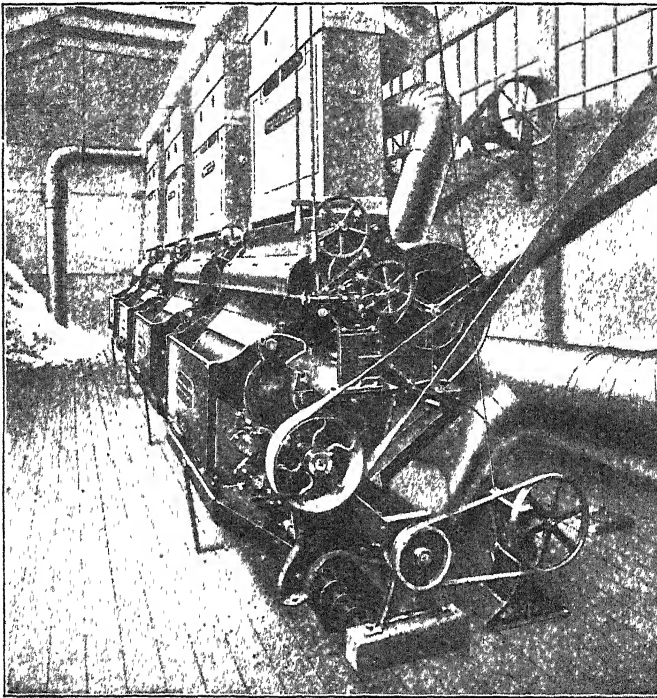
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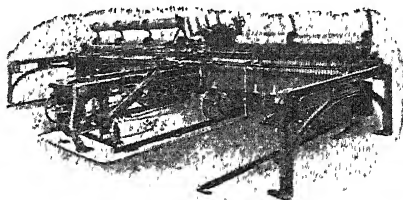
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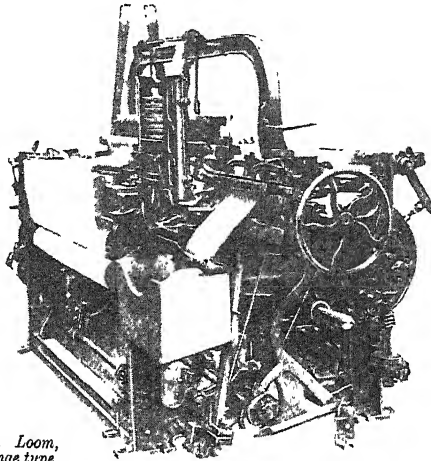
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	PAGE		PAGE
ALBRECHT, F., & Co. . . . .	722	MANCHESTER RAW COTTON Co., LTD. . . . .	723
ALEXANDRIA COMMERCIAL Co. . .	633	MANCHESTER SHIP CANAL Co. . .	1 and back cover
AMERICAN COTTON GROWERS' EX-CHANGE . . . . .	front cover	MATHER & PLATT . . . . .	715
ANDERSON, CLAYTON & Co. . . .	590	MATTHEWS & YATES, LTD. . . .	674
AUGUSTINO, P., & Co. . . . .	626	MEYNELL, HENRY, & Co. . . . .	654
BAER, HENRY, & Co. . . . .	710	MUNDS & WINSLOW . . . . .	597
BARCELONA INTERNATIONAL EXHIBITION . . . . .	viii	MURRAY GIN Co. . . . .	594
BEHR, OTTO . . . . .	605	NEAL, W. C. . . . .	582
BOND, McENANY & Co. . . . .	605	PFLIEGER, PAUL, & Co. . . . .	585
BRITISH NORTHROP LOOM Co., LTD., THE . . . . .	653	PLATT BROS. & Co., LTD. . . . .	714
BROOKS & DOXEY (1920), LTD. .	648	PORT OF MANCHESTER WAREHOUSES	700
CITY WAREHOUSE WINDOW CLEANING Co., LTD. . . . .	681	PUGH-LYONS & Co. . . . .	589
"COMMERCE & FINANCE" . . . .	681	REED, M. H., & Co. . . . .	606
COMTELBURU LTD. . . . .	721	REINHART & Co. . . . .	634
CONTINENTAL GIN COMPANY . . .	717	REYNOLDS & GIBSON . . . . .	597
COOK, THOS., & SON, LTD. . . .	682	RIETER & Co., JOHN JACOB . . .	659
CRÉDIT GÉNÉRAL DE BELGIQUE . .	682	RÜTI MACHINE Co. . . . .	659
"CASTLE LINE" . . . . .	606	SALVAGO, C. M., & Co. . . . .	633
DELTA & PINE LAND Co. . . . .	602	SCOTT & Co. . . . .	606
DIXON, R. L., & BROTHER . . . .	605	SKINNER, THOS., & Co. . . . .	572
DOBSON & BARLOW, LTD. . . . .	699	SOC. ALSACIENNE DE CONSTRUCTIONS MÉCANIQUES . . . .	719
DODD, S., & SONS . . . . .	660	SOUTHERN COTTON COMPANY . . .	724
DRAPER CORPORATION . . . . .	601	STANDARD MARINE INSURANCE Co.	611
ECONOMOU, G. D., & Co. . . . .	626	STEWART BROTHERS COTTON COMPANY . . . . .	586
EGYPTIAN PRODUCE TRADING Co.	625	STUBBS, JOSEPH, LTD. . . . .	699
FRANÇOIS, L. F., & CIE. . . . .	581	TARVER, STEELE & Co. . . . .	589
GREER STAPLE COTTON COMPANY	585	TAYLOR, LANG & Co., LTD. . . .	722
HETHERINGTON, JOHN, & Co., LTD.	719	TETLOW, HENRY, & SONS . . . .	602
HOWARD & BULLOUGH, LTD. . . .	673	TEXAS FARM BUREAU . . . . .	593
HUDSPETH, G. J., & Co. . . . .	589	TEXTILE DEVELOPMENT Co. . . .	598
HUSNI, SONS & CHINASSI . . . .	721	"TEXTILE, LA," SOCIÉTÉ CO-OPÉRATIVE . . . . .	710
JOANNIDES, J. G., & Co. . . . .	617	TWEEDALES & SMALLEY (1920), LTD. . . . .	716
JONES, A. LYNTON, & Co. INC. . .	605	UNIVERSAL WINDING Co. . . . .	v
KAHN, J., & Co. . . . .	581	VICKERS (CRAYFORD), LTD. . . .	iii
KENYON, JAMES, & SON, LTD. . . .	720	WELD & Co. . . . .	700
KUPFER, H. . . . .	626	WESTERN UNION TELEGRAPH Co. .	586
LANCASTER & TONGE . . . . .	674	WILLIAMS, WILSON & Co. . . . .	602
LAWLER, H. H., & Co. . . . .	586	WILSON BROS. BOBBIN Co., LTD. .	713
LEES, ASA, & Co., LTD. . . . .	654	WILSON, S. B. & Co. . . . .	602
LIVERPOOL COTTON ASSOCIATION .	718	WOOLLEY, JAMES, SONS & Co., LTD.	681
LORD BROS., LTD. . . . .	648	WORRALL, JOHN, LTD. . . . .	662

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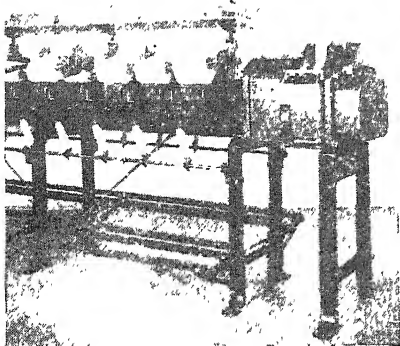
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# CONTENTS

---

	PAGE
COMMITTEE'S COMMUNICATIONS . . . . .	..555-565
EXTRACT FROM MINUTES OF THE COMMITTEE MEETING AT BRUSSELS, VOTE OF CONDOLENCE TO LADY MACARA; BARCELONA CONGRESS SUBJECTS; RECEPTION OF COMMITTEE BY H.M. THE KING OF THE BELGIANS; JAPAN AND CHINA REPORT; CONGRESS 1931; COTTON INSURANCE, STATE OF TRADE REPORTS; PROVISIONAL PROGRAMME BARCELONA CONGRESS.	
STATE OF TRADE REPORTS . . . . .	..567-571
AUSTRIA, 567, POLAND, 569; U.S.A., 569.	
COTTON GROWING IN NEW COUNTRIES . . . . .	..573-580
ARGENTINE, 573; BRAZIL, 573, BRITISH EMPIRE, 574, MOROCCO, 575; RUSSIA, 575, SPAIN, 576, UGANDA, 576; INDIA, IRAQ, EGYPT AND SUDAN, 578; EAST AFRICA, 580.	
AMERICAN COTTON . . . . .	..583-611
1928 CROP, 583; AMERICAN COTTON SHIPPERS' ASSOCIATION, 587, NEW COTTON PICKERS, 588; SEASON'S HISTORY OF CROP, 591; U.S. MILL CONSUMPTION, 592; WORLD'S AMERICAN COTTON CONSUMPTION, 595; NEW USES OF AMERICAN COTTON, 595; 1929 COTTON CROP, 607, MARKET LETTERS, 608	
EGYPTIAN COTTON . . . . .	..612-613
MINUTES OF BRUSSELS MEETING, 613; HUMIDITY, 613; MIXING LAW, 615, BARCELONA CONGRESS ARRANGEMENTS, 615; NEW VARIETIES, 616; JUTE PACKING, 617, MOISTURE TESTS STATISTICS, 618, NEW STRAINS OF UPPERS, 621; MAARAD COTTON, 630; U.S.A. TARIFF ON EGYPTIAN COTTON, 637; GINNED COTTON BY VARIETIES, 637; EXPORTS, 639; GOVERNMENT COTTON STOCKS, 639, FINAL EGYPTIAN COTTON CROP FIGURES, 640; CONDITION OF CROP, 640; FINANCIAL AID TO FARMERS, 641; MARKET LETTERS, 642	
EAST INDIAN COTTON . . . . .	..644-647
FINAL ESTIMATE, 644, COTTON PRESSED IN INDIA, 646; U.S.A. INDIAN COTTON CONSUMPTION, 647; MARKET LETTER, 647.	
TECHNICAL SECTION . . . . .	..649-661
HARTMANN PROCESS, 649; SHUTTLELESS LOOM, 650; EFFECT OF TEMPERATURE AND HUMIDITY ON COTTON SPINNING, 651; ONE OR TWO HEADS OF DRAWING INSTEAD OF THREE IN SPINNING, 652; CUTTING OUT WASTE, 655; SEGUNDO DEFIBRATING MACHINE, 658, BARBER-COLMAN AUTOMATIC SPOOLER, 661.	



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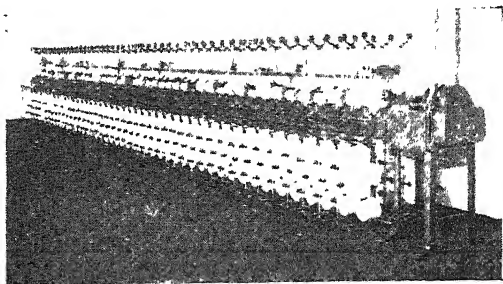
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CONTENTS—*Continued.*

	PAGE
COTTON MILL NOTES . . . . .	663-688
THE ERA OF COMBINATION IN THE LANCASHIRE COTTON INDUSTRY, 663, AUTOMATIC LOOMS, 666; THE EIGHT-LOOM EXPERIMENT IN BURNLEY, 677. BOMBAY COTTON MILL STRIKE, 680; MEXICAN COTTON INDUSTRY, 683, ENGLISH TRADE UNION ATTITUDE TO DOUBLE SHIFTS, 684, THE MILL STRIKE IN BOMBAY, 684, CAUSES OF STRIKES IN BOMBAY THE REMEDY, 685, SPINNERS' MARGIN, 686, AUSTRALIAN DUTIES ON COTTON YARN, 686, YARN COUNTS SPUN IN U S A, 687	
MISCELLANEOUS . . . . .	689-698
COTTON AND THE BELGIAN COTTON INDUSTRY, 689, COMPARISON OF COTTON GREY CLOTH PRICES, 695, NEW YORK COTTON EXCHANGE TRADING IN TEXTILE SECURITIES, 697, INDIA'S COTTON GOODS IMPORTS, 697. JAPANESE EXPORTS, 698, POLAND SELLS TO SOVIET RUSSIA, 698	
COTTON TRADE STATISTICS . . . . .	701-709
AMERICAN COTTON MILLS' CONSUMPTION IN U S A, 701; IMPORTS OF FOREIGN COTTON INTO U S A, 701, U S A IMPORTS OF COTTON AND MANUFACTURES, 702, U S A EXPORTS OF COTTON, 702; COTTON YARN EXPORTS FROM ENGLAND, 703, COTTON CLOTH EXPORTS FROM ENGLAND, 704, INDIA IMPORTS AND EXPORTS, 706, COTTON YARN PRODUCTION IN INDIA, 707, COTTON CLOTH PRODUCTION IN INDIA, 708, WORLD'S TOTAL COTTON CROPS, 709	
REVIEWS OF CURRENT COTTON LITERATURE . . . . .	711-712

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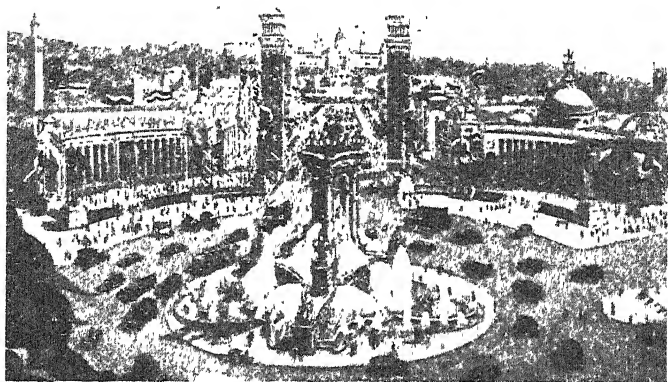
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# Barcelona International EXHIBITION

## 1929

### THE WORLD'S MOST IMPORTANT EXHIBITION

# INTERNATIONAL COTTON BULLETIN

No. 28. Vol. VII, 4.

July, 1929

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## COMMITTEE'S COMMUNICATIONS.

**EXTRACTS from the MINUTES of MEETING  
of INTERNATIONAL COTTON COM-  
MITTEE, held on Friday, 24th May, 1929,  
at the Comité Central Industriel, 33, Rue  
Ducale, Brussels.**

There were present: Messrs. F. Holroyd (President), (England), Count Jean de Hemptinne and R. Brasseur (Belgium), Dr. Arnost Zucker and Dr. J. Muzik (Czecho-Slovakia), William Howarth, Lt.-Col. N. Seddon Brown, F. A. Hargreaves, W. H. Catterall, W. Heaps and G. Berry (England), Paul Schlumberger, Roger Seyrig and R. A. de la Beaumelle (France), Geh. Kom. Otto Lindenmeyer, A. W. Schütte and Dr. W. Böhm (Germany), Joan Gelderman (Holland), Dr. G. Mylius and Dr. Silvio A. Soldini (Italy), Sir Thomas Smith (India), John Syz and Caspar Jenny (Switzerland), Arno S. Pearse (General Secretary), and John Pogson (Assistant Secretary).—Messrs. Catterall, Heaps and Berry were present at the meeting in the forenoon only as representatives of the Joint Egyptian Cotton Committee.

Apologies for non-attendance were received from Messrs. Blikstad (Norway), Santiago Trias (Spain), K. Shimada (Japan), H. P. Taveira (Portugal); Arthur Kuffler (Austria), and others.

### VOTE OF CONDOLENCE TO LADY MACARA.

Before proceeding to the business on the agenda the President referred in suitable terms to the loss sustained since the last

meeting by the death of Sir Charles Macara, Bart., the first President of the International Cotton Federation. The Committee expressed their sympathy by standing in silence, and the Secretary was authorized to convey the expression of condolence of the Committee to the widow and family of the late Sir Charles Macara.

The Minutes of the previous meeting, which had been circulated to the members of the Committee, were taken as read and confirmed.

## BARCELONA CONGRESS.

The arrangements for the Barcelona Cotton Congress were considered, and the General Secretary reported upon his visit to Barcelona in connection therewith, submitting the following draft of the provisional programme of the fourteenth International Cotton Congress, to be held at Barcelona, in commemoration of the twenty-fifth anniversary of the foundation of the International Cotton Federation, from September 18 to 22, 1929. The programme of the Congress will be found on page 563.)

The following SUBJECTS to be discussed at the Barcelona Congress were then fixed:—

(1) *Automatic Looms.*

Mr. F. A. Hargreaves (England) undertook to obtain a representative from his section of the trade to examine the details of the recent questionnaire in regard to automatic looms and prepare a paper on the subject for the Congress.

Mr. C. Jenny (Switzerland), also agreed to prepare a paper on the same question.

(2) *How can the Use of Cotton be Extended?*

(3) *The Extent of Displacement of Cotton by other Fibres.*

(4) *Cotton Growing.*

(5) *Humidity in Egyptian Cotton.*

(6) *New Varieties of Egyptian Cotton.*

Other subjects relating to Egyptian, which may be suggested by the members of the Joint Egyptian Cotton Committee.

If suitable arrangements can be made for a cotton dress parade, Col. N. Seddon Brown promised to supply some dresses.

Mr. William Howarth undertook to obtain from Sir William Himbury a synopsis of the work undertaken and the progress made in cotton growing in the British Colonies and Dependencies.

As regards invitations to the Congress, it was decided that the Cotton Textile Institute of America should be invited to send representatives, and one of them to prepare a paper on the new uses of cotton.

As regards other invitations it was decided to leave these to the discretion of the President and the General Secretary.

### RECEPTION OF COMMITTEE BY H.M. THE KING OF BELGIUM.

At this stage the Committee made their way to the Royal Palace, where they were graciously received by H.M. King Albert of Belgium, who entered into conversation with every member of the International Committee and the Joint Egyptian Cotton Committee. His Majesty evinced great interest in the cotton industry, and assured the members that he would at all times lend his help in furthering the aims and objects of the International Cotton Federation.

On returning to the Conference rooms the Chairman moved that a resolution of thanks be conveyed to H.M. the King, through Count Jean de Hemptinne, for the very gracious and kindly manner in which he had received the International Committee.

This was unanimously agreed to.

---

On resuming after luncheon, Mr. Carlier, President of the Central Industrial Committee of Belgium, extended a welcome to the International Cotton Committee, to which the President suitably responded.

Mr. William Howarth, Chairman of the Joint Egyptian Cotton Committee, gave a brief account of the proceedings of the previous day's meeting. (*See Egyptian Cotton Chapter.*)

### JAPAN AND CHINA.

The General Secretary submitted the following verbal conclusions on his recent journey to Japan and China:—

“The Japanese cotton spinning and manufacturing industry could never have achieved her present position without that group instinct which is generated by the family system, and which is still characteristic of Japan. The individual is only a small entity, he will put his firm first, and the firm puts itself in the background, but works for the national welfare. The Emperor is still the personification of Deity, and every Japanese claims to be part and parcel of his family; the whole State is one “trust.” It is that spirit which has been the cause of Japan's rapid development, and it is the same group instinct that has led to the huge combinations in the Japanese cotton industry.

I would attribute as a second cause for Japan's rapid advancement what we in Europe would call speculation. I quote from the official publication of the Japan Cotton Spinners' Association. It says: “At the commencement of hostilities the mills in Japan had to contract purchases of raw cotton at about 30 yen per picul to cover their requirements for a whole year or longer, twice as much as they used to do in the normal time, lest a continued warfare on the ocean might bring a disastrous famine of raw cotton to the islands of the Orient remote from the seat of cotton plantations. In the course of time the price of raw cotton steadily advanced to 100 yen and more, followed by a still greater advance of cotton yarn price in Japan.” None of that cotton was hedged. It was a great surprise to me that not one of the big combines and very few, if any, of the financially weak mills hedge their cotton purchases. I made absolutely sure about this, and

asked the presidents of the cotton combines, several of their mill managers, and all the leading cotton merchants, and I was assured time after time that it is quite a common occurrence for these combines to have 30,000, 50,000, and at times even 80,000 bales unhedged. If the price goes against them they buy more cotton, and they argue that, after all, 30,000 bales only represents one month's consumption for the average combine, and cannot be regarded as a speculation.

The profits made in this way during the war have enabled them to build up such huge reserves that the average reserves of all the mills belonging to the Japan Cotton Spinners' Association, which represents to-day 97 per cent. of the total spindles of Japan, is over 60 per cent. of the paid-up capital, and that of the large combines substantially over 100 per cent. of their paid-up capital. With these huge war profits, which have amounted, according to the official showing of the Association, to anything from five to seven million pounds sterling for each combine, they have extended their mills in Japan, given bonus shares, they have added to the reserves, and finally they built with this superabundance of money mills in China which to-day represent more than one-third of the total spindles in China.

The third cause of the strength of the Japanese cotton industry is to be found in the organization. In the first instance we have the four mill combines controlling 60 per cent. of the whole industry. Then we have three very large cotton-buying firms, which also undertake the selling of the manufactured goods and have cut out any intermediary between themselves and the wholesale dealer in China, India, etc. These cotton importers have houses in many parts of China, India, Java, etc., and handle the manufactured goods at a very low profit. I am credibly informed by the presidents of two of them that on greys they do not reckon to make more than 1 per cent., on dyed and bleached goods 2 per cent., and prints  $2\frac{1}{2}$  per cent., whilst the European houses sell to an importer, who, in the case of China, has to employ almost always a compradore, and I was able to ascertain from one of these European importers that he made at least 3 per cent. on greys. He had to pay a compradore 1 to  $1\frac{1}{2}$  per cent. Therefore European goods will certainly be dearer by at least  $4\frac{1}{2}$  per cent. on account of not having a direct link between European exporting houses and wholesale dealers up country.

The very wealthy position of the mill combines makes the cotton merchants anxious to sell to them, and for that reason the mills always enjoy the benefit of the favourable speculation of the cotton merchants. In a list which I have obtained from an American cotton exporter you can see distinctly that prices in Osaka are from 2 to 5 per cent. cheaper than the cost of replacement in the United States.

As the last advantage, but still a very important one, you must reckon the cheaper cost of labour in spinning as well as in weaving. From all the information which I have been able to gather the labour cost for spinning 20's is about  $\frac{1}{2}$ d. per pound cheaper than that of the cheapest countries in Europe. As regards the labour cost of weaving, the fact that the average number of looms per

operative in the associated mills is 5.5 against 3 on the Continent and 4 in England shows that there is a considerable advantage there. We must further take into consideration the fact that the wage for looking after 5.5 looms in Japan is 3s. 6d. per day and the production per loom is higher, certainly not lower than in England for similar cloths. Japan's overhead expenses are high owing to freight, packing insurance on imported spinning machinery and owing to the very extensive welfare work. Europe has a great advantage under this heading over Japan, but, of course, the very large profits made have enabled the industry to write down considerably the values of machinery.

The cost of erecting a new factory is about £8 per spindle—i.e., in erected buildings. Weaving machinery is almost exclusively made in Japan; their Toyoda automatic loom is excellent, having 25 per cent. more picks per minute than any American automatic loom. One of the Lancashire textile machinists is at present in Japan with a view to buying this Japanese invention.

The workpeople are docile; there may be occasional strikes, but as 80 per cent. of all the operatives are girls between the ages of 14 and 20, who remain in the mill only for about two or three years, they are not likely to join any unions in large numbers.

For the present I consider that Japan has reached its saturation point, particularly as the Japanese have built in China a large number of mills, which, of course, affect the export figures of Japan; but Japanese are extreme optimists, and they will not stop cotton mill building. Cotton mills pay better than any other industry in Japan. It was originally the idea that the Japanese mills in China should spin the coarse counts and that eventually the Japanese mills should send these coarse counts to Japan, whilst the mills in Japan should concentrate on spinning medium and fine counts. Evidently this plan has miscarried; certainly Japan is spinning much finer than she used to do a few years ago, as you may be able to trace from the list of counts which I have given in the report, but at the same time China has not limited herself to spinning coarse counts; 40's is quite a common number in China, though, of course, the bulk is 16's.

The abolition of night work in Japan as from July 1, 1929, led many people to believe that this would be the cause of a considerably increased cost of production in Japan. That is not so. The Japanese mill owners were working for two years organized short time to an extent of 23 per cent., but only 15 per cent. was latterly carried out. These 15 per cent. have been given up. Besides this, two working days per month are added. So far mills were resting on four days per month, but the Government made a concession, and the legal rest days are now only two per month, which will be adhered to. The new working hours are two shifts of 8½ hours per day, or 28 days × 17 hours per month of thirty days. There will have to be some insignificant increase in wages to the men, representing at the most 20 per cent. of the workpeople. The girls are all on piecework. They will receive the same wages, as the working hours per month will remain the same, if they are not slightly more. Many mills have installed automatic looms and warp stop motions, so that they can work them a

little time without supervision. In short, the abolition of night work will mean a slight increase in output.

In China the cost of spinning is slightly lower than in Japan, owing to cheaper labour, but the cost of weaving is not lower than in Japan, rather higher, because the operatives are not yet able to look after as many looms as they do in Japan, and any advantage in wage is probably counterbalanced by the larger number of hands. The weaving mills in China are almost entirely confined to weaving shirtings and sheetings, some stripes. China has now tariff autonomy, and we are sure to see increased duties on cotton goods in the near future which will place the mills established there in a still further advantageous position. China will be for the European industry a more formidable competitor in her own country than Japan is at present."

In conclusion, Mr. Pearse said he was full of admiration for the welfare work which the various cotton firms in Japan are carrying on. About 80 per cent. of the operatives live on the premises, and two hours are daily devoted to schooling. Not only is the ordinary school curriculum provided, but practical subjects and even ethics are taught. The mill operatives of Japan are all able to read and write, and their general standard of education must be quite up to that of the mill operatives of England. Every operative has a bath daily, and the dormitories in which the operatives sleep are an example of cleanliness and comfort. In the past the mill operatives of Japan might have been none too well treated, but they are treated extremely well to-day. Those living on the mill premises are better off than in their own homes. The Japanese mill operative, in spite of only temporary employment in the mill, is very nimble and quite on a par with most European cotton-mill operatives, due to the excellent training and supervision in the Japanese mills.

The thanks of the Committee for the valuable services rendered by Mr. Arno S. Pearse, the General Secretary, in connection with his journey were voiced by the President and other members of the Committee.

### **JOURNEY TO U.S.A.**

The decision arrived at at the previous meeting authorizing Mr. Norman N. Pearse to visit America this year on the same basis as previously was confirmed.

### **CONGRESS OF 1931.**

Invitations to hold the International Cotton Congress of 1931 were received from France and Czecho-Slovakia, but a decision was postponed until the next meeting of the International Committee at Barcelona.

### **COTTON INSURANCE.**

Mr. Jenny raised the question of insurance of cotton in connection with New York c.i.f. cotton contracts whilst in course of transit; he pointed out that the words "in due course of transit" were very vague and required closer definition.

Dr. Soldini explained the steps they had taken in Italy to define the words "in due course of transit," and as the period of transit

differs for each country, it was thought that each national association should first of all deal with the matter, and, if satisfaction could not be obtained, to report to the International Office.

#### FINANCIAL STATEMENT.

The financial statement for the year ending December 31, 1928, duly audited, was presented and approved.

The following **STATE OF TRADE REPORTS** were submitted :

#### BELGIUM.

The state of the cotton industry in this country is poor. Despite this fact, it is impracticable to restrict production for the reason that, short as they are of workpeople in the mills to-day, if short time was worked they would lose further operatives, who would transfer their labour to other industries, such as iron, glass, etc., which are busy.

#### CZECHO-SLOVAKIA.

The deplorable position of the section spinning American cotton is shown by the fact that in the last fortnight 20's American had been sold at 59 cents the kilo, equal to 13d. per lb. With this price even these mills, which are very well equipped technically and in a good financial position, cannot work without a heavy loss. Attempts to organize short-time working have not succeeded. The section spinning from Indian cotton is doing better. The Egyptian section, however, shows a falling-off as compared with a year ago, together with shrinking margins.

In the weaving section conditions are bad and short-time working is in operation. In dyed goods conditions are better, and still better in high-class goods.

#### ENGLAND.

Taken as a whole, trade generally is worse than in France in the Egyptian spinning section of the trade, and the immediate prospects are not assuring. In the American section of the spinning industry trade is as bad as it can be. Large combines are being formed with a view to establishing the trade on a more economic basis. There is, however, more enquiry, but, so far, orders of important size have not followed.

As regards the weaving section, about 20 per cent. of looms are stopped.

#### FRANCE.

The state of trade generally is bad, and there is overproduction in yarns. Efforts to curtail production have been tried without success. There is a great shortage of labour, and the situation, both as regards spinning and weaving, is not, at the moment, encouraging.

#### GERMANY.

At present the production of spinning in Germany is about 50 per cent. of the full capacity, and heavy losses are being sustained

in both spinning and weaving. The outlook is not promising. The agricultural classes are suffering from the imports of foreign wheat, which is much cheaper than the German produce, owing to Germany's high wages; farmers, in many cases, are unable to pay the heavy taxes of the State.

#### HOLLAND.

The spinning trade is suffering mainly from the competition of Germany, and prices are very poor; in fact, yarn prices in Holland are lower than in any other country. Our manufacturers are able to obtain supplies of cheap yarns. The home trade (50 per cent.) is good because the economic situation in the country has greatly improved in the last few years. The export trade is not so good, and, although manufacturers are working full time, very little profit is being made.

#### INDIA.

Last year was a most disastrous one in the history of the cotton mills in India. Bombay, where the bulk of the mills are, was afflicted with a strike lasting six months, and for the last 13 months had hardly been free from labour troubles. At the moment these looked like settling down and the outlook was more hopeful. Elsewhere conditions were more promising than in 1928.

#### ITALY.

Whilst the mills are practically working full time, the margin shows little or no profit, and demand is diminishing. The immediate future prospects are, therefore, unfavourable. At present there is under discussion a demand from the workpeople for an increase in wages. The wages to-day are six and a half times above the pre-war figure, whilst the rate of exchange is three and a half times higher and the cost of living five and a half times higher than pre-war.

For the last few months the output seemed somewhat better, but lately the demand has slackened again. Mill owners are trying to maintain as much as possible the full working of the machinery, even if it is a question of selling without margin or with very little profit.

#### SPAIN.

The outlook is considerably better in this country. The principal reason for this is that they are obtaining better crops. Altogether, the financial position of the cotton industry has improved.

#### SWITZERLAND.

The position in this country is deplorable in every respect. Many looms have been stopped, and, like Belgium, the manufacturers are afraid that, if further stoppages of machinery take place, they will experience difficulty in securing the necessary workpeople when they want to restart, owing to the activity of other industries. Looms are working at a loss, but, sooner or later, unless conditions improve, further short time will be absolutely imperative.

## CONGRESS OF INTERNATIONAL CHAMBERS OF COMMERCE.

It was decided that the President and General Secretary should attend the forthcoming Congress of the International Chambers of Commerce at Amsterdam.

In the event of the President finding himself unable to make the journey, it was decided that Mr. John Syz should deputize for him.

The General Secretary was requested to contribute a paper on the subject of the International Cotton Federation's cotton statistics, as well as on the Arbitration Rules of the International Cotton Federation.

### DATE OF BARCELONA COTTON CONGRESS.

As it was found that the date fixed for the International Cotton Congress at Barcelona was not quite suitable to some members of the Committee, the General Secretary was instructed to endeavour to make arrangements for the postponement of the Congress to the beginning of October.\*

---

## Provisional Programme of the Fourteenth International Cotton Congress to be held in Barcelona.

*President of the Congress :* SANTIAGO TRIAS.

*Wednesday, September 18, 1929:—*

9-45 a.m. Opening Session of Congress in the historic Town Hall of Barcelona.

Addresses of Welcome by Mr. SANTIAGO TRIAS, President of the Congress and member for Spain of the International Cotton Committee.

Addresses of Welcome by the Mayor of the City of Barcelona.

Reply by Mr. F. HOLROYD, President of the International Cotton Federation, who will also report on the activities of the International Cotton Federation during the last few years.

Reply by Mr. JOHN SYZ, Honorary President of the International Cotton Federation, to address of welcome.

Financial Statement and fixing the Levy for 1930 and 1931.

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\* *After telegraphic communication with various interested parties it was found inadvisable to change the dates of the Barcelona Congress. The Congress will therefore be held as originally fixed, from September 18 to 22, 1929.*—ARNO S. PEARSE.

## (1) COTTON GROWING :

(a) In Spain.

(b) In Colonies of other affiliated countries.

## (2) HOW CAN THE USE OF COTTON BE EXTENDED ?

## (3) EXTENT OF DISPLACEMENT OF COTTON BY OTHER FIBRES.

3-0 p.m. Visit to Old Barcelona. (Motor cars will call for the delegates at their hotels.)

5-0 p.m. Tea.

9-0 p.m. Banquet offered by the Spanish Master Cotton Spinners' and Manufacturers' Association at the Old Exchange "La Lonja."

*Thursday, September 19, 1929:—*

9-45 a.m. Second Session of Congress, in the Congress Hall of the Palace of Agriculture in the Exhibition Grounds.

## EGYPTIAN COTTON SUBJECTS :

(a) Humidities.

(b) New varieties.

Afternoon: Visit to the International Exhibition. Tea in the Old Spanish Village and general festivities.

Evening: Free.—An inspection of the unique illumination of the Exhibition is recommended.

*Friday, September 20, 1929:—*

Visit to a Mill. (Electric trains leave Plaza de Cataluña at about 10 a.m.).

Lunch at Montserrat.

Visit to Monastery, etc.

Return to Barcelona, arriving about 7 p.m.

Evening free.

*Saturday, September 21, 1929:—*

9-45 a.m. Third Session of Congress in the Congress Hall of the Palace of Agriculture in the Exhibition Grounds.

## THE AUTOMATIC LOOM.

## RESOLUTIONS.

3-0 p.m. Visit to the Palace of Textile Industry, and inspection of special cotton spinning and weaving machinery. special cotton spinning and weaving machines.

5-0 p.m. Tea in the "Rosalada" (Rosary) of the Exhibition.

9-0 p.m. Banquet offered by the City of Barcelona, in the historic Town Hall.

*Sunday, September 22, 1929:—*

3-0 p.m. Bull Fight. (Individual visits to Exhibition in the morning.)

Ladies accompanying the delegates are invited to all functions, and to the opening session of the Congress.

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An *Enquiry Office* will be opened from Tuesday, September 17, until Thursday, September 19, where delegates are requested to register their names, the hotels, participations in the various social functions, and receive free admission cards to the Exhibition, as well as Congress badges.

A representative of Messrs. Thomas Cook & Son Ltd. will be in attendance for the purpose of changing money and arranging travel tours. The various branch offices of this firm in the various countries will book tickets, rooms, etc.

Rooms may be ordered direct from the hotels. The best known are: "Colon," "Majestic," "Bristol," "Continental," and "Victoria"—all situated in the centre of the city. When ordering rooms delegates should state that they are members of the International Cotton Congress. There will be a scarcity of rooms, and delegates are therefore asked to order rooms as early as possible, to state the exact date of arrival, and ask the hotel for an acknowledgment of the hotel reservations.—Rooms have been promised to all delegates of the Cotton Congress, if application is made before July 15.

The list of applications to take part in the Congress closes definitely on July 15, 1929, at the Head Office of the International Cotton Federation, 238, Royal Exchange, Manchester.

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During the stay in Barcelona the delegates will be temporary members of the "Club Ecuestre."

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Restaurants for lunch or dinner in the city are:—

Maison Doree, Plaza de Cataluña.

Restaurant Colon, Plaza de Cataluña.

Casa Llibre, Calle Cortes.

Font del Lleo, Pedralbes.

Cafe Suizo, Ramblas.

Oro del Rhin, Calle Cortes.

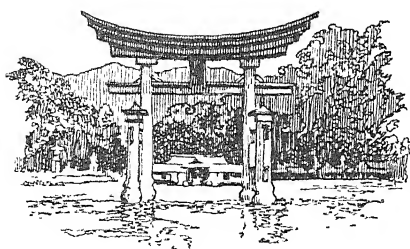
There are several restaurants in the Exhibition.

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Papers on the various subjects should reach the Head Office in Manchester not later than August 1. Translations will be made as far as possible, and copies will be sent to each delegate some time before the Congress date.

A special label for the luggage will be issued to the delegates with a view to facilitating Custom House examination.

It is necessary to reserve early sleeping accommodation in the train from Paris to Barcelona, and vice versa.



# The Cotton Industry of Japan and China

The Report by ARNO S. PEARSE,

*General Secretary of the International Cotton Federation on his recent journey will be ready towards the end of July.*

## JAPAN

### Contents :

GENERAL INFORMATION ABOUT JAPAN.

GENERAL INTRODUCTORY REMARKS.

HISTORICAL DEVELOPMENT.

ORGANIZATION OF THE INDUSTRY.—Japan Cotton Spinners' Association; List of Cotton Mills, with Capital; Spindles; Looms; Geographical Distribution of Mills; Financial Position; Organization of Mitsui; Toyo Menkwa; Nippon Menkwa; Gosho; Sampin Exchange.

RAW COTTON.—Mill Consumption; Kinds of Cotton; Method of Purchase; Freights; Warehousing; Cotton Growing.

TECHNICAL SECTION.—Description of Mills visited; Examination of Samples; General Remarks on Spinning, Weaving, Costings, Taxation; Automatic Looms; Cost of Erecting a Mill.

LABOUR.—Dormitories; Operatives' Household Budgets; Wages; Labour Unions; Factory Legislation; Abolition of Night Shifts; Factory Inspection.

BLEACHING, DYEING AND PRINTING.—Modern Establishments; Quotations for Bleaching, Dyeing, Printing.

COTTON HOSIERY INDUSTRY.

COTTON YARN AND CLOTH PRODUCTION.—Exports and Domestic Consumption.

EXPORT ORGANIZATION.

JAPANESE IMPORT DUTIES.

15 ILLUSTRATIONS AND A NUMBER OF SKETCHES.

## CHINA

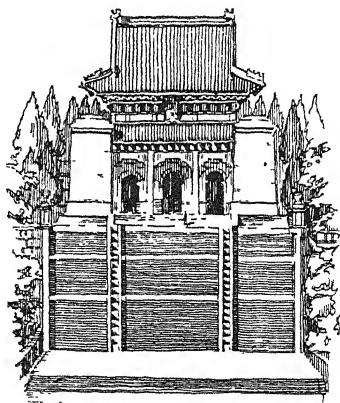
General Information about China; General Introductory Remarks; Historical Development; List of Cotton Mills; Financial Composition of Mills; Shanghai Cotton Mills; Cost of Mill Building; Staffing of Machines; Production; Factory Law; Housing of Operatives; Wages; Labour; Technical Section; Visits to Mills; Costings; Raw Cotton; Cotton Mixing; Purchase of Cotton; Cotton Growing in China; Exports of Manufactured Cotton Goods from China; Imports of Manufactured Cotton Goods into China; Custom House Tariff.

### 6 ILLUSTRATIONS.

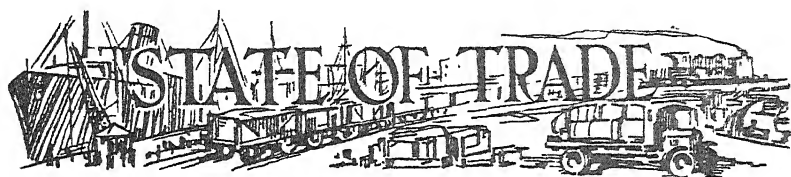
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## REPORTS FROM ASSOCIATIONS.

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No material change has taken place in the markets since the holding of the meeting of the International Committee at Brussels at the end of May. The reports submitted at that time (p. 561) still hold good.

The following are a few reports from additional countries:—

### AUSTRIA.

*(Extract of the following German report):*

#### SPINNING SECTION.

Business since April has become worse both as regards quantity and price. Increased stocks of goods can only be avoided by running short time, which, however, is not on an organized basis, but individual. Curtailment is obtained principally by abolition of the second shift. The bad state of trade is mainly due to unsatisfactory yarn exports to Germany and Hungary, and also Roumania. Prices are, owing to bad trade, very unfavourable, particularly as regards yarns spun from American cotton. The margin is slightly better for yarns made of East Indian cotton.

#### WEAVING SECTION.

In this section conditions are likewise unfavourable, leading to short time, and occasionally entire cessation of work. Coarse goods are affected most, and it is very difficult to go over to the making of fine goods. Efforts are being made to put the weaving mills technically on a more modern basis.

It is hoped that business for the winter will somewhat improve, as during the long period of cold weather stocks of winter goods have been reduced in shops.

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*The following is the original report of the Austrian Cotton Spinners' and Manufacturers' Association:—*

#### (1) BAUMWOLLSPINNEREI.

Der Geschäftsgang hat sich seit dem letzten im April erstatteten Berichte weder in Bezug auf den Absatz noch auf die Preisbildung

günstiger gestaltet. Vielmehr ist der Absatz, der im Monate Februar verhältnismässig angestiegen war, seither wieder gesunken, so dass das Entstehen von übermässigen Lagerbeständen nur durch Betriebseinschränkungen vermieden werden konnte. Diese Einschränkungen sind nicht in organisierter Form, sondern nach den individuellen Verhältnissen des einzelnen Betriebes durchgeführt worden. Vor allem wurde das Arbeiten in 2 Schichten sehr stark abgebaut und auch die Betriebszeit der Einheitsschichte vielfach eingeschränkt. Weitere Massnahmen der gleichen Art sind zu erwarten. Diese Absatzschwierigkeiten sind in der Hauptsache auf den ungünstigen Geschäftsgang in den für den Garnexport in Betracht kommenden Ländern, wie in Deutschland und Ungarn zurückzuführen. Auch der Export nach Rumänien ist rückläufig, weil die dortigen Geldverhältnisse das Kreditrisiko des Importeurs in bedenklichem Grade erhöht haben.

Im Zusammenhang mit der Absatzlage hat sich auch die Preisbildung namentlich in Amerika-Garnen noch weiter ungünstig entwickelt. Etwas besser ist die Spinnmarge in Garnen aus ostindischer Baumwolle, obwohl auch hier ein rentabler Betrieb nicht erzielt wird.

Die amtlichen Ziffern über die Aussenhandelsbewegung während der abgelaufenen Periode des Jahres 1929 liegen noch nicht vor, doch steht ausser Zweifel, dass dieselben einen namhaften Rückgang sowohl in der Baumwolleneinfuhr als auch im Garnexport erkennen lassen werden.

## (2) BAUMWOLLWEBEREI.

Auch in diesem Betriebszweige ist die geschäftliche Lage anhaltend ungünstig, weshalb Betriebseinschränkungen und vereinzelt auch Stilllegungen durchgeführt wurden. Während die Produktion in schwereren Rohgeweben bereits hypertroph ist und daher zu einem scharfen Wettbewerb und den damit verbundenen Preisunterbietungen geführt hat, begegnet die Umstellung auf feinere Gewebe erheblichen Schwierigkeiten, welche hauptsächlich durch die unrichtige Gestaltung des Zolltarifs bedingt sind. Dieser Tarif weist eine Staffelung der Sätze auf, welche die leichteren und dichteren Gewebe wesentlich ungünstiger stellt, als die schwerere und gröbere Ware. Die Folge davon ist, dass die Preisbildung in den leichten Geweben und in den Spezialartikeln vom Ausland beherrscht wird. — Auch in bunten Geweben haben sich sowohl Absatz- wie Webmarge verschlechtert. Unter diesen Umständen ist der Ausbau der Weberei, welcher im Hinblick auf das Missverhältnis zwischen der bestehenden Produktion und dem Inlandsbedarf an sich möglich wäre, wieder ins Stocken gekommen. Die Geweeinfuhr zeigt seit der Neuregelung der Zölle (August 1927) keine nennenswerte Verminderung, woraus hervorgeht, dass auch die neuen Zölle keinen Schutz gegen das Einstürmen von Produktionsüberschüssen einzelner Auslandsstaaten bieten. Nichtsdestoweniger werden in den Betrieben grosse Anstrengungen zur Verbesserung der Produktionsmethoden gemacht, und die erzielten Erfolge sind in Berücksichtigung der besonders schwierigen Verhältnisse als befriedigend zu bezeichnen.

Was die Aussichten für die weitere Geschäftsentwicklung anbelangt, so sind dieselben nicht leicht zu beurteilen, weil sie in

Bezug auf die Spinnerei von der Konjunkturentwicklung in den Absatzländern und in Bezug auf die Weberei von der Konsumfähigkeit des Inlands abhängen. Immerhin wird erwartet, dass sich das Wintergeschäft lebhafter gestalten wird, weil die Lagerbestände im Zwischen- und Kleinhandel während der langen Kälteperiode des abgelaufenen Jahres stark gelichtet wurden.

## POLAND.

Forty-three of the largest cotton mills of Lodz and district, employing 61,839 operatives, are working only 3.8 days per week, according to a report from U.S.A. Department of Commerce.

The Polish Association reports as follows:—

	1st Shift	2nd Shift
Cotton spinning spindles ...	1,183,368 ...	1,150,158
Waste ... ..	57,264 ...	37,024
Looms ... ..	23,314 ...	15,944
Workmen .. .	63,549	

The cotton industry worked during all the weeks of 1929; unsatisfactory conditions of trade find their expression in a shortening of working days per week. Reduction of work fluctuated in the period from January in terms from 2.95 to 15.75 per cent. of the normal working week of 46 hours.

The exports of cotton goods according to the publications of the Government amounted in the period from January 1 till April 30, 1929, to 17,206 tons representing a value of 70,594,000 zł.

## U.S.A.

Recent cables indicate that the majority of the mills in the Southern States will close their mills for a week beginning 4th July and further curtailments are planned, unless demand springs up.

This is the first time that so many mills in the South resort to short time. Trade must indeed be bad in the whole of the U.S.A., if these modern mills which work largely on mass production lines are forced to curtail production.

Garside states that the average margin is down to the extreme low level of a year ago and profits are no longer possible on many lines of goods for most mills. Consumption over a long period in U.S.A. is decidedly upward but margins are downward. The former is accounted for by increased population and larger use of cotton, particularly for industrial purposes, and the falling margin is explained not only by severe competition but also by higher efficiency of new mills, by mass production methods and double shift working.

The Association of Cotton Textile Merchants of New York reported on 10th June:—

Statistical reports of production, sales and shipments of standard cotton cloths during the first five months of 1929, and also for the month of May, were made public to-day by the Association of Cotton Textile Merchants of New York. The figures for May cover a period of five weeks.

During the first five months of 1929 shipments were 1,583,324,000 yards. This was equivalent to 101.6 per cent. of production, which was 1,558,921,000 yards.

Sales under the same five months period were 1,496,975,000 yards, or 96.0 per cent. of production.

During the five months stocks decreased 6.2 per cent. and unfilled orders decreased 18.4 per cent.

Shipments during May were 326,121,000 yards. This was equivalent to 95.5 per cent. of production, which was 341,370,000 yards. May production rate was 3.8 per cent. less than April.

Sales in May amounted to 278,335,000 yards, or 81.5 of production.

Stocks on hand at the end of the month amounted to 367,340,000 yards, an increase of 4.3 per cent. as compared with stocks at the beginning of the month.

Unfulfilled orders on May 31st amounted to 382,512,000 yards, or 11.1 per cent. less than they were on May 1st. As on May 31st, 1929, unfilled orders represented nearly six weeks production at the current rate.

These statistics on the manufacture and standard cotton cloths are compiled from data supplied by twenty-three groups of manufacturers and selling agents reporting through The Association of Cotton Textile Merchants of New York and The Cotton-Textile Institute, Inc. The reports cover upwards of 300 classifications of standard cotton cloths and represent a large part of the production of these fabrics in the United States.

#### PRODUCTION STATISTICS.

The following statistics cover upwards of 300 classifications or constructions of standard cotton cloths, and represent a very large part of the total production of these fabrics in the United States. This report represents all of the yardage reported to the Association and The Cotton-Textile Institute, Inc. It is a consolidation of the same 23 groups covered by the reports since October, 1927. The figures for the month of May cover a period of five weeks.

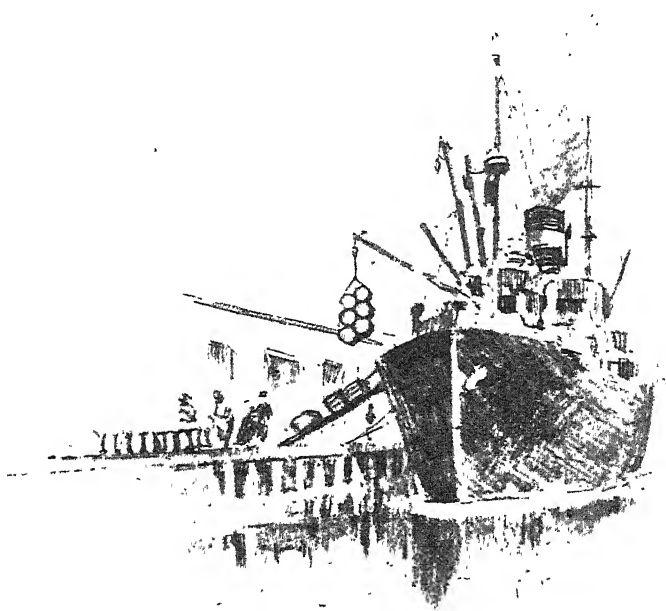
	First 5 months of 1929. yards	May, 1929 (5 weeks). yards
Production was . . . . .	1,558,921,000	341,370,000
Sales were ... ..	1,496,975,000	278,335,000
Ratio of sales to production ... ..	96.0%	81.5%
Shipments were ... ..	1,583,324,000	326,121,000
Ratio of shipments to production ... ..	101.6%	95.5%
Stocks on hand at start ... ..	391,743,000	352,091,000
Stocks on hand at end ... ..	367,340,000	367,340,000
Change in stocks ... ..	Decrease 6.2%	Increase 4.3%
Unfilled orders at start ... ..	468,861,000	430,298,000
Unfilled orders at end ... ..	382,512,000	382,512,000
Change in unfilled orders ... ..	Decrease 18.4%	Decrease 11.1%

## SPINDLE ACTIVITY IN U.S.A.

The following table showing the percentage of capacity at which the cotton industry is operating is based on the Census Bureau's report of spindle hours run during the month. In order to make the figures comparable for the New England and Cotton-Growing States full-time capacity is assumed to be 48 hours per week.

NEW ENGLAND STATES						
	March			April		
	1929	1928	1929	1928		
	Average	Percent	Average	Percent	Percent	
	hours per	of	hours per	of	of	
	spindle	Cap.	Spindle	Cap.	Cap.	
	per month		per month			
Massachusetts ..	165	80.5	161	76.8	56.8	
Rhode Island ..	197	96.1	203	96.9	71.2	
N. Hampshire ..	172	83.9	155	74.0	71.2	
Connecticut ..	209	102.0	220	105.0	84.1	
Maine ..	183	89.3	175	83.5	67.3	
COTTON-GROWING STATES						
Alabama ..	296	144.4	309	147.5	131.0	
Georgia ..	308	150.2	325	155.1	141.0	
N. Carolina ..	316	154.2	317	151.3	138.5	
S Carolina ..	361	176.1	342	163.2	149.9	

The cotton consumption in U.S.A. during May was 668,000 bales, the total up to end of May was 5,982,000 (including 257,000 bales foreign cotton) against 5,884,000 in the previous period.



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# COTTON GROWING

## IN NEW COUNTRIES

### ARGENTINE.

ARGENTINE COTTON SHIPMENTS IN MARCH, 1929, IN BALES, WITH  
COUNTRY OF DESTINATION.

Shipper in Buenos Aires	Spain	Germany	England	Total	Jan to March, 1929	Jan. to March, 1928
C.I.A.M.T. ..			291	291	813	-
Bunge & Born ..	99	-		99	688	513
Weigel, Bohnen & Co. 201	42	128		371	499	-
Brown & Co. ..	---	---	---	---	486	96
Com. Belgo Arg...	-	-			377	380
L. Dreyfus & Co.				-	203	-
A. T. Riveros ..		68		68	68	135
Others .. ..		-		-	---	68
	<u>300</u>	<u>110</u>	<u>419</u>	<u>829</u>	<u>3,134</u>	<u>1,192</u>

### BRAZIL.

BRAZILIAN COTTON ACREAGE AND YIELD. 1927-28.

*Revised returns from Ministry of Agriculture.*

States	Area in Hectares	Equivalent Acres	Yield Kilos	Bales of 180 kilos.
Amazonas .. ..	1,015	2,507	100,000	556
Pará .. ..	8,658	21,385	1,450,000	8,056
Maranhão .. ..	47,176	116,525	9,980,000	55,444
Piauí .. ..	5,000	12,350	1,237,605	6,876
Ceará .. ..	96,000	237,120	17,000,000	94,444
Rio Grande do Norte .. ..	58,000	143,260	13,500,000	75,000
Parahyba .. ..	84,000	207,480	19,900,000	110,556
Pernambuco .. ..	80,000	197,600	19,004,289	105,579
Alagoas .. ..	23,133	57,138	4,372,512	24,292
Sergipe .. ..	29,997	74,093	4,590,150	25,501
Bahia .. ..	20,000	49,400	3,000,000	16,666
Espírito Santo .. ..	900	2,223	240,000	1,333
Rio de Janeiro .. ..	2,521	6,227	504,200	2,801
São Paulo .. ..	42,400	104,728	9,459,065	52,550
Minas Geraes .. ..	23,236	57,393	4,666,666	25,926
Goyaz .. ..	1,500	3,705	250,000	1,389
Other States .. ..	1,230	3,038	250,000	1,389
Totals .. ..	<u>524,766</u>	<u>1,296,172</u>	<u>109,504,487</u>	<u>608,358</u>

## BRITISH EMPIRE.

## Approximate Estimate of Cotton grown in new fields in the BRITISH EMPIRE.

(BALES OF 400 LBS.)

	1922	1923	1924	1925	1926	1927	1928
Gold Coast .. ..	—	1,000	3,000	600	100	100	100
Nigeria :							
Southern Provinces ..	4,600	5,000	7,600	10,300	9,400	10,000	4,300
Northern Provinces ..	9,000	13,900	16,400	29,300	39,500	15,400	20,000
West Africa .. ..	13,600	19,900	27,000	40,200	49,000	25,500	25,000
Uganda Protectorate ..	40,000	85,000	128,600	196,000*	180,800*	132,000*	138,500*
Kenya Colony .. ..	400	1,200	1,300	2,300	300*	1,200*	650
Tanganyika Territory ..	7,175	11,400	17,500	25,200*	27,400*	22,000	27,400*
Nyasaland and Rhodesia ..	5,700	6,500	8,700	13,100	14,800	5,600	4,600
Union of South Africa ..	2,800	6,000	8,700	1,800	20,400	10,200	11,000
East, Central and South Africa .. ..	56,075	110,100	164,800	255,400	243,900	171,000	182,150
Sudan .. ..	24,300	28,000	46,100	42,700*	122,100*	158,900*	129,200*
West Indies .. ..	4,000	5,000	5,000	4,900*	5,800*	5,700	5,000
Australia .. ..	3,300	9,000	10,500	15,000	9,000	6,000	8,500
Iraq .. ..	300	1,500	2,500	2,500	3,500	1,800	5,200
Fiji .. ..	—	100	200	200	1,000	1,000	1,000
Sundries .. ..	3,700	5,900	5,800	5,800	5,000	5,000	3,500
Total .. ..	105,275	179,500	261,900	366,700	439,300	374,900	359,550
Approximate value ..	£2,862,700	£5,529,500	£8,373,200	£9,732,600	£9,301,300	£9,412,000	£9,386,000

In addition there has been a production of improved long-stapled cotton in the Punjab during 1927-28 of 223,000 bales.

\* Denotes exports.

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**MOROCCO.**


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Thirty to thirty-five tons seed cotton were produced this year.

The cotton is of good quality and brokers who have seen it are astonished at its uniformity, not only in one field but of the total crop. The comparison with Algerian cottons is entirely in favour of Morocco cotton, and this is due to the methodical action which we are undertaking. The cotton is somewhat woolly, but clean, and of 38 to 40 mm. length. Its price is about 1.50 francs below that of Egyptian Sakel. (*Report by M. Hesling, Director of French Cotton Growing Co.*)

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**RUSSIA.**


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ACREAGE PLANNED, CONTRACTED FOR AND SOWN IN NEW RUSSIAN  
COTTON GROWING REGIONS, 1928-29 AND 1929-30.

(As per Foreign Crops and Markets.)

Country	Planned		Contracted for		Sown
	1928-29	1929-30	1928-29	1929-30*	
EUROPE.	acres	acres	acres	acres	acres
North Caucasus :					
Dagestan .. ..	2,698	7,413	3,175	5,320	2,864
Terek .. ..	675	7,413	803	4,139	932
Kuban .. ..	618	7,413	348	3,531	462
Lower Volga :					
Astrachan .. ..	1,102	2,965	1,401	1,465	1,334
Karlmuk region ..	86	618	87	—	54
Crimea .. ..	—	124	—	—	—
Total European Russia	<u>5,179</u>	<u>25,946</u>	<u>5,814</u>	<u>14,455</u>	<u>5,646</u>
ASIA.					
Kazakstan .. ..	25	1,977	25	—	25
Kirghizia .. ..	598	988	598	—	598
Total Asiatic Russia	<u>623</u>	<u>2,965</u>	<u>623</u>	<u>—</u>	<u>623</u>
Total new regions..	<u>5,802</u>	<u>28,911</u>	<u>6,437</u>	<u>14,455</u>	<u>6,269</u>

\* Area contracted for by February 1, 1929.

Soviet Main Cotton Committee

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**COTTON GROWING IN SOVIET RUSSIA.**

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An area of 2,595,000 acres has been planted to cotton this spring in Soviet Central Asia (Turkestan), in accordance with the official "plan," according to a statement by the Chairman of the Main Cotton Committee in the Russian paper, "Economic Life," as of April 18, 1929. An earlier report from Acting American Agricultural Commissioner O. L. Dawson in Berlin gave a figure for the official plan of cotton acreage in Central Asia of 2,327,000 acres.

The "plan" for the distribution of agricultural implements has

been completely and satisfactorily carried out. By the 1st of April, 5,500 car loads of fertilizer, or 70 per cent. of the quantity planned, had been distributed among the growers. This was more than double last year's 2,000 car loads, which amounted to only 50 per cent. of last year's plan. A delay in the shipment of the remaining 30 per cent. this season is causing some apprehension as to the complete success of the "plan." The water supply for irrigation does not cause any apprehension as the rainfall and snow supply in the mountains exceed the average for many years. The shortage of agronomic and directing personnel is considered a weak spot in the sowing campaign. (*Foreign Crops and Markets, Washington, D.C.*)

## COTTON GROWING IN SPAIN.

Under the title "Resumen de su Actuacion" the Cotton Commission of the Government has issued its report on its 5 years' activities.

The crop amounted to:—

		1924-25	1925-26	1926-27	1927-28	1928-29
Bales of 400 lbs.	..	1,154	1,108	3,599	2,670	3,207
Hectares	.. ..	1,474	2,165	4,607	4,624	8,680

The ginning factory at Tabladilla is very modern with 4 × 70 saw gins of Murray, Atlanta, Ga.

The King of Spain takes a personal interest in the movement and has visited the plantations in Andalusia.

Perhaps some of the delegates of the International Cotton Congress to be held in Barcelona will visit the cotton growing fields of Spain.

Mr. Manuel Garcia Barzanallana is the General Secretary of the Government Cotton Commission, with offices at 12, Magdalena, Madrid.

## UGANDA

The twenty-fourth annual report of The British Cotton Growing Association shows that, in spite of the adverse climatic factors affecting both growing conditions and the farming population, the outturn of cotton was greater than expected, reaching:—

		Bales exported (400 lbs)		Value		Tax rate per lb.		Tax Revenue
1928	...	138,486	...	£2,475,328	...	6 cents	...	£164,483
against								
1927	...	131,728	...	£1,690,838	...	2 cents	...	£51,478

Grade and staple were maintained and were slightly better than the average, and no serious disease or pests were notified. Cotton still maintains its pre-eminent position as the chief item of export, forming, with seed, 87½ per cent. of the total. Unless something unforeseen occurs its position is not likely to be seriously threatened.

Shipments to India increased, whilst Japan took a smaller proportion than in the previous year. It is fairly certain that a considerable proportion of the Indian imports is transhipped to Japan, but the exact figures are difficult to obtain. If the Indian shipper cannot find a market in Bombay, he frequently re-consigns to Liverpool, the total freight cost of this roundabout method being no more than the direct route, Mombasa to Liverpool.

No new ginnery sites were granted in 1928, but even then the number of ginneries in the country to the comparatively small crop with the consequent very heavy overhead charges is still a serious problem, and in years when there is a setback in the crop it is very much aggravated.

The position can readily be seen by the following figures of the production of bales and the number of ginneries for the last four years:—

	1924/25	1925/26	1926/27	1927/28
Production of bales of 400 lbs. each	198,038	180,834	131,728	138,486
Number of ginneries ... ..	155	176	192	192
Bales per ginnery ... ..	1,278	1,027	686	721

It is to be hoped that under no circumstances will the Government be persuaded to grant further ginnery sites for some years. There is sufficient machinery erected in the country to handle a crop five times the size of the largest crop yet produced. According to the Department of Agriculture Report for 1927 there are 1,868 roller gins and 166 saw gins in licensed ginneries, the crop for that year was 131,728 bales, sufficient to keep the gins running only 53 days of 10 hours.

The marketing position is quite as serious as the ginning position. Seed cotton is purchased direct from natives at all ginneries, 192 in number, and in addition there are 155 market centres at which there are from 1,500 to 1,700 buying stores. The buying of seed cotton at all these stores, with rents, licence fees, wages, transport, etc., is an exceedingly heavy item, which ultimately has to be paid by the producer. The efforts of ginners to obtain sufficient cotton to run their ginneries a reasonable time has led to severe competition and to very large numbers of ginners losing money.

A move in the direction of reducing a lot of these charges was made in 1928 by the formation of a Seed Cotton Buying Association amongst ginners in the Buganda Province, and similar associations are being formed for 1929 in the Buganda Province, and in some districts of the Eastern Province.

The Buganda Association has been in operation during the year. There has naturally been some criticism of its methods, and the varying prices paid to the native grower have been criticized, but on the whole the business cannot have been remunerative to buyers. The avowed objects of these associations are price fixing and elimination of much of the unnecessary competition and multiplication of services. It is possibly the prelude to a combination of ginning interests involving the suppression of a proportion of the 192 ginneries which are far in excess of the country's requirements, and concentration on the bigger centres. Many economies and reductions in working costs could be effected, and must take place if Uganda is to compete in cotton growing with countries such as the U.S.A., India and Egypt.

Motor transport as a result of the excellent roads has increased enormously, far beyond the necessities of the case, and incidentally creates a problem for the Government in the maintenance of roads.

Uganda cotton has for some years commanded a considerable premium for the best type, but the present year has witnessed a big fall in basis, through causes unconnected with the quality, which has been well maintained.

A 200,000 bale crop for Uganda is by no means the limit of which the country is capable. Half a million is a possibility, but such a figure postulates a demand, which as far as Great Britain is concerned at the moment, is not evident.

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## Developments in India, Iraq, Egypt and Sudan.

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SIR WILLIAM HIMBURY, managing director of the British Cotton Growing Association, recently returned from a tour to the above countries.

The following is a summary of his report:

### INDIA.

In the Punjab several large irrigation schemes were nearing completion, Sir William said, and others were contemplated. Eventually in this Province and the Native States there should be 20,000,000 acres under water for the growing of cereals, cotton, and other crops. The Lloyd Barrage at Sukkur, in Sind, was making excellent progress, and an enormous amount of work had been done since he last visited the area three years ago. It was expected that the Dam would be across the Indus in a year's time and the whole work completed in 1932, when approximately 5,000,000 acres would be watered for wheat, rice and cotton.

[In connection with Sir William Himbury's Report on the construction of the Lloyd Barrage at Sukkur it may be recalled that in our reports on Cotton Growing of India, 1910 and 1913, we repeatedly urged the construction of this Dam and included this subject in our requests to the Secretary of State for India.—NOTE BY EDITOR.]

Incidentally, the completion of the scheme would increase the importance of Karachi as a port. I feel assured of the success of the scheme, although it would take time to colonize the whole area. Cotton of the American type, it had to be said, had not been doing too well lately in Northern India owing to the ravages of a pest known as the White Fly. Experts, however, were tackling the problem, and it was possible that an alteration in the time of planting the seed would go far to defeat this insect trouble. Agriculture generally was going ahead in India.

Sir William Himbury draws attention to the immense addition to land suitable for cotton crops which will be made by the irrigation schemes now nearing completion in the Punjab, where the Association has its principal cotton estate; and he shows how the

supply of pure seed from that estate, and the example given by the scientific methods practised there, are of benefit to other cultivators of the Province.

#### EGYPT.

"I am pleased," he says, "with the great progress which has taken place in the organization for the improvement of Egyptian cottons through the use of good seed under the famous botanist Dr. Balls, F.R.S., and also in the distribution and harvesting of these cottons. Much successful work is being done by the Egyptian Agricultural Society, of which King Fuad is president."

#### SUDAN.

It is in the Sudan, however, that Sir William has noted the most remarkable developments since his last visit three years ago. In the Gezira territory, once utterly derelict under the savage tyranny of the Khalifa, and cursed by recurrent famine, there is to-day a flourishing industry which he holds up as a model for the whole cotton-growing world.

"In the Sudan I was most favourably impressed with the great cotton-growing scheme operating there, undoubtedly one of the finest object-lessons in the world, which I should like to see copied in other potential cotton-growing countries. The tenants are given good seed and instructed in the most up-to-date tillage and methods of cultivation. Every care is taken to keep the fields clear of weeds and the cotton free from extraneous matter when harvested. It is very carefully dealt with at the up-to-date ginneries, and the user gets a pure product direct from the grower, who knows nothing about loose methods of cultivation, and so gets the maximum return for his labour. All this is undoubtedly due to the wise policy of the local government in leaving the management control with the Sudan Plantations Syndicate, whose organization deserves the commendation of all interested in Empire development.

"The rain-grown or American types of cotton from the Nuba Mountain or Mongalla areas are making excellent progress, and this is a great step of immense value politically. Local tribes, who formerly caused the authorities much anxiety, now have time only for making money. During the past few years the policy of the Sudan has been that of trade development, and it has more than justified itself.

#### IRAQ.

"In Iraq, there are no large irrigation schemes under consideration at the moment, but the agricultural development of the country is making steady progress. Pumps have already been installed by farmers to an extent which gives a total capacity of from 40,000 to 50,000 h.p. The pumps are in units of 30 to 50 h.p., and in nearly all cases are of British make. Larger crops are being produced. The cotton crop last season was practically doubled, and the same progress is anticipated this year. There should be excellent prospects for sheep. The people seem anxious to make money and improve their condition in life, and the only thing necessary, so far as I could see,

was for the authorities, who exercise from time to time local control, to settle down seriously to the economic development of their rich country.

“King Faisal himself is setting a good example by cultivating over 2,000 acres of cotton and other crops, and many former Ministers and members of Parliament are following his example. But this is not enough, and I strongly recommend the provision of a demonstration and seed farm for the supply of pure seed of all products to the thousands of Iraq farmers who are making an attempt to get a living out of the land and who need this material assistance.”

## COTTON EXPORTS FROM EAST AFRICA DURING 1928.

The total exports of Kenya and Uganda cotton during the whole year, 1928, amounted to 139,117 bales, to which may be added during the same period 27,402 bales from Tanganyika, or a total of 166,519 bales from East Africa.

In summary, as near as comparison can be made, the following was the principal consumption of the cotton exports from East Africa during the whole year 1928. Figures for the two preceding years are given for the purposes of comparison:—

					— January to December —		
					1926	1927	1928
Total exports	..	..	..	..	208,484	153,935	166,519
Great Britain	..	..	..	..	92,505	53,901	65,519
India	..	..	..	..	74,550	63,702	99,771
Japan	..	..	..	..	30,556	33,439	16,827

This cotton is highly appreciated in Japan, where spinners just now pay almost the same price as for Egyptian Uppers, with which it is being freely mixed in Japanese mills. Some of the above imports into India are re-shipped to Japan. During last year a Japanese Steamship Company started calling at the East African ports principally on account of these cotton shipments.



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## U.S. Cotton Crop of 1928.

The Department of Agriculture in conjunction with the Census Bureau have now established the final figures (published 17th May, 1929).

The area under cotton cultivation in the United States on July 1, 1928, totalled 46,946,000 acres, of which 45,341,000 acres were picked, making the area abandoned 1,605,000 acres. The average yield of lint cotton picked per acre was 152.9 pounds, making the total production 14,478,000 bales of 500 pounds gross weight (478.6 pounds net weight), as compared with a production of 12,956,000 similar bales in 1927. The ginned crop of 1928-1929, as reported by the Census Bureau, totalled 14,296,549 running bales, as compared with 12,783,112 running bales ginned in 1927-1928. It may be added that the reduction in the average yield per acre due to various causes in 1928 is estimated by the Department of Agriculture to have been 36.4 per cent. of a normal or full crop, as compared with a similar reduction of 38.5 per cent. in 1927, of 29.5 per cent. in 1926, and of 36.0 per cent. in 1925. The principal cause of damage to the crop in 1928 was the boll-weevil, estimated by the Department to have been responsible for a loss of 14.1 per cent., which compares with a loss of 18.5 per cent. from this cause in 1927, and with an average boll-weevil damage of 14.0 per cent. for the 10 years from 1917 to 1926.

The production details by States are as follows:—

				1928		1927
Virginia	..	..	..	44,000	..	31,000
North Carolina	..	..	..	836,000	..	861,000
South Carolina	..	..	..	726,000	..	730,000
Georgia	..	..	..	1,030,000	..	1,100,000
Florida	..	..	..	19,000	..	17,000
Missouri	..	..	..	147,000	..	115,000

	1928	1927
Tennessee .. .. .	428,000	359,000
Alabama .. .. .	1,109,000	1,191,000
Mississippi .. .. .	1,475,000	1,355,000
Louisiana .. .. .	691,000	548,000
Texas .. .. .	5,106,000	4,352,000
Oklahoma .. .. .	1,203,000	1,037,000
Arkansas .. .. .	1,246,000	1,000,000
New Mexico .. .. .	88,000	70,000
Arizona .. .. .	149,000	91,000
California .. .. .	172,000	91,000
Other States .. .. .	7,000	7,000
Total .. .. .	<u>14,478,000</u>	<u>12,955,000</u>

The following are the acreage details (in thousands of acres) :—

	1928		1927	
	Planted	Harvested	Planted	Harvested
Virginia .. .. .	81	79	65	64
North Carolina .. .. .	1,892	1,860	1,749	1,728
South Carolina .. .. .	2,485	2,361	2,454	2,356
Georgia .. .. .	3,883	3,728	3,501	3,413
Florida .. .. .	101	95	67	64
Missouri .. .. .	355	334	305	291
Tennessee .. .. .	1,145	1,107	985	965
Alabama .. .. .	3,643	3,534	3,214	3,166
Mississippi .. .. .	4,154	4,029	3,408	3,340
Louisiana .. .. .	2,052	1,990	1,585	1,54
Texas .. .. .	18,330	17,743	16,850	16,176
Oklahoma .. .. .	4,420	4,243	4,187	3,601
Arkansas .. .. .	3,834	3,681	3,142	3,048
New Mexico .. .. .	123	117	100	95
Arizona .. .. .	202	200	140	139
California .. .. .	223	218	130	128
Other States .. .. .	23	22	23	22
Total .. .. .	<u>46,946</u>	<u>45,341</u>	<u>41,905</u>	<u>40,138</u>

Not included in the totals are 160,000 acres planted in Lower California, from which 80,000 bales were harvested, against 45,000 bales picked in the previous season from 110,000 acres.

#### ANALYSIS OF THE REDUCTION FROM FULL YIELD PER ACRE, 1926-1928, OWING TO VARIOUS CAUSES.

State	Deficient moisture			Excessive moisture			Other climatic plant diseases		
	1926	1927	1928	1926	1927	1928	1926	1927	1928
Virginia .. .. .	15	13	6	0	8	9	0	5	5
North Carolina .. .. .	8	5	1	1	3	9	1	1	4
South Carolina .. .. .	20	6	1	0	5	14	5	2	15
Georgia .. .. .	7	11	0	1	4	15	4	1	6
Florida .. .. .	4	13	7	2	1	12	5	0	15
Mexico .. .. .	3	0	6	5	41	22	5	6	8
Tennessee .. .. .	6	6	8	5	10	14	2	4	4
Alabama .. .. .	1	7	1	4	2	13	6	1	3
Mississippi .. .. .	4	3	3	2	5	10	2	3	3
Louisiana .. .. .	7	2	2	5	8	6	3	12	3
Texas .. .. .	2	9	8	4	3	2	2	2	4
Oklahoma .. .. .	2	0	4	5	5	4	4	3	4
Arkansas .. .. .	12	5	3	3	11	8	2	6	6
*Average of 13 States	<u>5.3</u>	<u>6.4</u>	<u>4.4</u>	<u>3.2</u>	<u>4.9</u>	<u>7.3</u>	<u>2.9</u>	<u>2.8</u>	<u>4.9</u>

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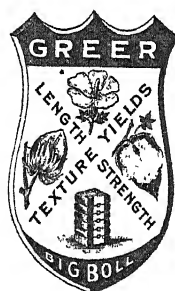
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State	Other climatic plant diseases			Boll-weevil			Other insects		
	1926	1927	1928	1926	1927	1928	1926	1927	1928
	%	%	%	%	%	%	%	%	%
Virginia ..	0	0	1	0	2	10	0	0	0
North Carolina ..	1	2	1	3	16	12	1	5	2
South Carolina ..	1	2	1	4	27	15	8	1	1
Georgia ..	1	1	2	5	18	14	10	2	2
Florida ..	1	2	0	4	9	9	7	17	2
Mexico ..	1	1	0	2	0	0	6	0	5
Tennessee ..	2	2	3	2	3	2	7	2	1
Alabama ..	2	2	5	3	15	12	5	2	1
Mississippi ..	1	1	2	6	16	14	6	2	2
Louisiana ..	4	0	2	9	12	18	4	3	2
Texas ..	4	2	2	11	20	12	14	6	6
Oklahoma ..	0	0	0	8	31	26	4	8	4
Arkansas ..	0	1	2	3	11	15	8	5	1
* Average of 13 States	2.1	1.5	1.9	7.1	18.5	14.1	8.9	4.4	3.4

Zero indicates no damage or less than 1 per cent damage.

\* These States include practically all of the Cotton Belt proper.

## AMERICAN COTTON SHIPPERS' ASSOCIATION.

Mr. H. G. SAFFORD, President of the Houston (Texas) Cotton Exchange, was elected President of the American Cotton Shippers' Association at the fifth annual Convention held at New Orleans, April 26 and 27.

Mr. Safford is one of the most energetic cotton men in the South. He has been active on many special committees and has frequently been called in by the Washington Government for his expert advice. He is a partner in the firm of McCaa & Safford, Houston, Texas.

At the above convention papers were read in favour of the Net Weight Cotton Contract, and resolutions were adopted including the following:—

The Committee on Foreign Arbitrations and Appeals and Foreign Rules and Practices recommended:—

That as the present systems of arbitrating cotton in Havre, Milan, Ghent and Brussels are satisfactory our agreements with those markets be continued.

Believing an arbitration and one appeal when properly conducted sufficient to determine a just reward on the quality of cotton, the committee recommends that due consideration be given to discontinuing the use of appeal boards in Rotterdam and Bremen on CIF sales, thereby having the super-appeal boards operate as the one and only appeal.

If Barcelona still desires its own system of arbitration we recommend that sales be made subject to Barcelona arbitration—unless otherwise agreed, this arbitration to be conducted in Barcelona by a representative of buyer and a representative of seller; and in case they are not able to come to an agreement to call in a third party agreeable to both; the American association to have the privilege of having a representative in Barcelona, and the seller can appoint him to serve as representative on arbitrations. Appeals from this arbitration would be made to some European appeal board on which we

have direct representation, the award of this committee being final. Differences to be established by difference committee on which we have representative.

The committee recommended that the directors continue negotiations with Liverpool and Manchester that changes may be brought about to make their appeal boards satisfactory to American shippers.

It recommended mutual bargains for all "on call" sales.

It recommended for all European markets the practice that 15 per cent. better bales in a shipment shall offset the same quantity of deficient bales.

Resolutions adopted favoured guides for business conduct and these others:—

Favouring a reduction of Government certification costs wherever possible, establishment of review boards at classification points to permit grading and stapling for certification, and reviewing not more than two days later at 50 cents per bale cost; favouring a movement to improve ginning; opposing splitting of types either by grade or staple to make finer distinctions than now in force; endorsing types for preparation on staples of 1½ inches or better, the lower staples being covered in official Government standards; opposing the suggestion that original class of cotton being reviewed be withheld from the review board; commending the Government's careful method employed in selecting both grade and staple types.

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## NEW COTTON PICKER.

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The new machine uses a wiping principle, no air suction. The American Cotton Growers' Exchange (co-operative cotton farmers) own a substantial participation in the new American Cotton Pickers Corporation, and Mr. C. O. Moser, the President of the American Cotton Growers' Exchange, is one of the directors of the new company.

The model going on the market this year is of the size of a motor cycle, weighing around 300 lbs., rolls on three wheels and carries its own bag holding about 100 lbs. of seed cotton; it will pass between rows as narrow as 30 ins. wide where the plant growth is not higher than 5 ft., as often during the picking season as is desired, without injury to the plants.

The machine is designed for two operators, one on each side, each operator covering two or three rows, and the picker nozzles are manually directed to the ripe bolls and cannot injure the growing bolls. The machine will sell for \$475. It is engineered into the hands of the present class of cotton-picking labourers, not requiring skilled mechanics. It is powered with a 1-h p. gas engine, requiring about one gallon of gasoline per day.

For this year 400 machines have been ordered and they will be sold through the co-operation of the American Cotton Growers' Exchange in equal lots of 100, at four localities to be selected in major cotton-producing sections like Dallas, Oklahoma City, Memphis, Little Rock, El Paso, etc. These machines will be kept in repair by the staff of the Automatic Picker Corporation, and it

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is anticipated that their performance will bring satisfaction to their purchasers.

The fact that the Farmers' Co-operatives are taking an active interest in the machine speaks well for it.

## SEASON'S HISTORY OF THE AMERICAN CROP, 1921-29.

(Tabulation compiled by Liverpool Cotton Service.)

As at	1921- 22	1922- 23	1923- 24	1924- 25	1925- 26	1926- 27	1927- 28	1928- 29
Acreage Planted (000's)								
July ..	26,519	34,852	38,287	40,403	46,448	48,898	42,683	46,695
December ..	32,332	34,485	39,224	41,490	48,160	49,086	42,112	46,943
May ..	31,678	34,016	38,701	42,641	48,090	48,730	41,905	46,946
Acreage Harvested.								
Preliminary ..	—	—	—	—	44,231	47,207	40,626	44,916
December ..	31,427	33,742	37,420	40,115	45,945	47,653	40,168	45,326
May ..	30,509	33,036	37,123	41,360	46,053	47,087	40,138	45,341
Abandonment.								
Acres ..	1,169	980	1,578	1,281	2,037	1,643	1,767	1,605
Per cent.	3.7	2.9	4.1	3.0	4.2	3.4	4.2	3.4
Condition per cent.								
Aug 1*	64.7	70.8	67.2	67.4	65.6	69.8	69.5	67.9
Sept 1*	49.3	57.0	54.1	59.3	56.2	59.6	56.1	60.3
Oct. 1*	42.2	50.0	49.5	53.5	56.6	61.3	54.2	54.4
Yield per acre planted (harvested where underlined) lbs.								
Aug. 1*	148.0	157.2	143.9	146.5	139.8	<u>158.3</u>	<u>156.8</u>	<u>152.2</u>
Sept. 1*	127.0	145.2	134.8	151.5	141.5	<u>153.6</u>	<u>149.3</u>	<u>153.9</u>
Oct. 1*	118.0	139.2	137.7	148.0	<u>159.7</u>	<u>168.4</u>	<u>149.3</u>	<u>149.1</u>
Nov. 1*	—	—	128.1	151.6	<u>166.4</u>	<u>181.4</u>	<u>151.2</u>	<u>150.0</u>
Dec. ..	<u>127.0</u>	<u>141.6</u>	<u>128.8</u>	<u>156.8</u>	<u>162.3</u>	<u>187.0</u>	<u>152.2</u>	<u>151.8</u>
March ..	<u>121.0</u>	<u>138.1</u>	<u>129.0</u>	<u>162.3</u>	<u>167.3</u>	<u>179.7</u>	<u>154.1</u>	<u>152.7</u>
Final ..	<u>124.5</u>	<u>141.6</u>	<u>130.6</u>	<u>157.6</u>	<u>167.2</u>	<u>182.6</u>	<u>154.5</u>	<u>152.9</u>
Indicated Crops (bales of 500 lbs gross) 000's.								
Aug. 1*	8,203	11,449	11,516	12,351	13,566	15,621	13,492	14,291
Sept. 1*	7,037	10,575	10,788	12,787	13,740	15,166	12,692	14,439
Oct 1*	6,537	10,135	11,015	12,499	14,759	16,627	12,678	13,993
Nov 1*	—	—	10,248	12,816	15,386	17,918	12,842	14,133
Dec. ..	8,340	9,964	10,081	13,153	15,603	18,618	12,789	14,373
March ..	7,953	9,762	10,128	13,619	16,086	17,910	12,950	14,450
Final ..	7,954	9,762	10,140	13,628	16,104	17,977	12,956	14,478
Ginnings (running bales, 000's).								
Prior to								
Aug. 1 ..	—	—	64	22	162	48	163	88
Sept. 1 ..	486	806	1,143	947	1,886	697	1,534	957
Oct. 1* ..	2,920	3,866	3,232	4,528	7,126	5,643	5,945	4,964
Oct. 18 ..	5,497	6,978	6,409	7,616	9,519	8,732	8,118	8,155
Nov. 1 ..	6,646	8,139	7,556	9,716	11,207	11,257	9,921	10,164
Nov. 14 ..	7,274	8,870	8,369	11,162	12,260	12,959	10,895	11,323
Dec. 1 ..	7,640	9,320	9,243	12,238	13,871	14,626	11,738	12,564
Dec. 13 ..	7,791	9,489	9,549	12,792	14,832	15,545	12,073	13,147
Jan. 16 ..	7,912	9,648	9,944	13,307	15,500	16,616	12,501	13,892
March ..	7,977	9,729	10,159	13,631	16,104	17,688	12,778	14,269
Final ..	7,978	9,729	10,171	13,639	16,123	17,755	12,783	14,297

\* 25th of previous month in 1921, 1922 and 1923.

## U.S. MILL CONSUMPTION OF COTTON BY VARIETIES.

In Running bales #000's; except foreign in equivalent 500lb bales

Season's Total-	Total	Upland	Egypt'n	Other Foreign	Sea Island	Amer. Egypt'n	Linters not included
1912-13	5483.3	5195.6	201.3	31.7	54.8	—	303.0
1913-14	5577.4	5301.4	151.1	43.2	81.7	—	307.3
1914-15	5597.4	5295.9	181.2	40.8	79.4	—	411.8
1915-16	6397.6	5998.0	269.3	47.7	82.6	—	880.9
1916-17	6788.5	6376.0	259.2	59.1	94.3	—	869.7
1917-18	6566.5	6296.8	136.4	47.4	85.9	—	1118.8
1918-19	5765.9	5517.6	126.1	50.0	51.2	21.1	457.9
1919-20	6419.7	5914.2	323.1	93.6	43.0	45.9	342.5
1920-21	4892.7	4641.5	159.2	56.6	18.7	16.8	516.3
1921-22	5909.8	5554.7	226.3	70.5	9.0	49.4	639.0
1922-23	6666.1	6250.8	262.3	81.5	6.3	65.2	646.1
1923-24	5680.6	5312.0	223.6	104.0	4.9	36.0	536.7
1924-25	6193.4	5894.5	191.5	84.4	4.0	19.0	658.8
1925-26	6455.9	6161.7	204.1	76.0	2.3	11.7	803.8
1926-27	7189.6	6859.2	239.8	69.7	1.2	19.7	806.1
1927-28	6834.1	6518.6	217.6	81.5	1.3	15.1	780.2
Monthly Figures—							
1926-27							
August	500.3	476.3	17.6	4.8	—	1.3	73.5
September	570.6	539.8	22.9	6.1	—	1.8	74.8
October	568.4	539.4	20.8	6.2	—	1.8	75.4
November	583.7	559.9	16.4	5.5	—	1.9	63.2
December	603.0	579.6	16.9	4.5	—	2.0	54.0
January	603.2	578.8	17.3	5.6	—	1.5	55.0
February	589.5	565.4	17.0	5.4	—	1.7	61.3
March..	693.1	663.6	21.8	5.9	—	1.8	69.2
April ..	618.3	591.1	19.5	5.9	—	1.7	67.7
May ..	629.9	600.4	22.1	5.6	—	1.8	72.0
June ..	659.8	625.2	26.0	7.3	—	1.3	70.0
July ..	569.8	540.6	21.4	6.7	—	1.1	69.9
1927-28							
August	634.5	604.0	22.5	7.0	—	1.1	76.2
September	627.8	599.7	19.8	7.1	—	1.1	80.4
October	613.5	586.0	19.4	6.9	—	1.2	75.3
November	626.7	598.7	20.5	6.2	—	1.3	63.9
December	538.8	512.7	18.9	5.9	—	1.3	53.8
January	586.1	557.8	20.2	6.6	—	1.5	56.1
February	572.9	544.1	20.4	6.9	—	1.4	57.8
March..	581.3	555.9	17.1	7.0	—	1.4	63.1
April ..	524.8	509.7	16.5	6.5	—	1.1	59.9
May ..	577.4	553.4	14.9	7.8	—	1.2	62.8
June ..	510.4	488.2	14.0	7.0	—	1.2	65.6
July ..	439.8	418.4	13.4	6.7	—	1.3	65.3
1928-29*							
August	526.7	510.0	18.5	6.0	—	1.1	68.2
September	492.2	469.5	16.1	5.9	—	0.7	68.6
October	618.8	591.2	19.6	6.7	—	1.3	76.1
November	610.9	586.9	17.6	5.2	—	1.3	68.6
December	534.4	510.6	17.8	4.6	—	1.3	59.6
January	668.4	638.1	22.2	6.3	—	1.8	68.6
February	598.1	570.9	19.5	6.4	—	1.3	68.1
March..	632.8	603.8	20.5	7.1	—	1.4	76.7
April ..	631.7	603.0	20.1	7.4	—	1.2	79.0
May ..	668.0						

(No details to hand so far)

\*Subject to revision.

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1" and above	$\frac{15}{16}$ " to 1"	below $\frac{15}{16}$ "
33.4%	41.1%	25.5%

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NOTE the percentage of longer fibres preserved, and consider this value to spinning qualities and less waste.

**Specify** that your cotton  
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## WORLD'S AMERICAN COTTON CONSUMPTION.

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Whilst the figures of the International Cotton Federation will be compiled only at the end of the season, early in August, and will be ready for publication early in September, Mr. A. H. Garside, of Boston, Mass., has published his estimate as being about 15,250,000 bales against our figure of 15,407,000 bales for *last* year. (Lint only.)

Mr. Garside's estimate would mean that the carry-over will be about 4,250,000 bales on July 1, 1929.

There has evidently been a decline in the consumption of American cotton among the European and Asiatic countries during the second half of the season, due to the lower parity of East Indian cotton, and trade during the recent months has been worse than ever before.

C. W. Stobbar publishes in the *New Orleans Cotton Trade Journal* his views on the likely carry-over. He argues that the final ginner's figure was 14,206,000 bales, to which must be added repacks, etc., with usual allowance for new crop movement, etc., which he places at about 304,000 bales; then he adds 1,150,000 bales linters, making the total of 15,750,000; by adding last year's carry-over of 5,300,000 he gets last year's seasons supply of 21,050,000 bales. He estimates consumption of lint and linters at about 16,000,000 bales and thus he arrives at a carry-over of 5,050,000 (including linters).

Making due allowance for linters Mr. Stobbar's and Mr. Garside's figures do not differ materially.

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## New Uses of American Cotton.

---

For the information of European Associations of Cotton Manufacturers it may be interesting to know that the Special Committee of the *Cotton Textile Institute* of New York is engaged on the following work:—

### PROMOTION OF STYLED COTTONS.

Style survey published 1928; industry finances promotional programme to the trade started February, 1929; style conference with dress manufacturers held October 9, 1928; displays of cotton fabrics and garments.

### EXPORTS.

American export classification for cotton goods revised; "Analysis of Some Features of our Cotton Textile Export Situation" published.

### COTTON FABRICS IN AERONAUTICS.

Estimated 1929 demand for planes, 2,000,000 sq. yds. airplane cloth; simplification of balloon fabric specifications; survey made of available

equipment for manufacturing; Guggenheim Fund interested in cotton fabric aerial markers.

#### CANVAS-TYRED CASTERS AND TRUCK WHEELS.

13.8-ounce duck used; potential demand in textile industry, 1,500,000 sq. yds.; results of tests; commendation by large textile mill using.

#### TRAFFIC GUIDES.

New use for narrow sheetings having potential annual market for 5,000,000 sq. yds.; description of fabric and uses.

#### CLEAVAGE CLOTH USED IN CONCRETE ROAD CONSTRUCTION.

Special cotton fabric for concrete highway construction, with estimated potential market, 5,000,000 sq. yds. per year developed by Institute; description of use.

#### COTTON FABRIC IN TOP SOIL ROAD CONSTRUCTION.

New use for open-weave 7-ounce cotton fabrics, requiring 3,500 sq. yds. per mile; description of use and development.

#### BRATTICE CLOTH.

8,000,000 sq. yds. brattice cloth used annually in mines; possibilities of increasing use of cotton fabrics for brattice cloth; Institute arranging for tests.

#### COTTON CONTAINERS.

500,000,000 sq. yds. narrow sheetings, osnaburg and print cloths estimated consumed annually; Textile Bag Manufacturers' Association's campaign; cement, sugar and fertilizer bags; opportunities for study and promotion.

#### COTTON BALING FOR PIECE GOODS.

Potential annual demand, 22,000,000 sq. yds.; freight classification made more favourable for use of cotton baling; tests to develop cotton-baling material.

#### COTTON BALING FOR COTTON.

Potential annual market, 80,000,000 sq. yds. heavy cotton fabric; tests by Department of Agriculture satisfactory; advantages cotton baling; net-weight basis.

#### BED SHEETS.

If 108-in. sheet generally used, estimated additional annual market for 20,000,000 sq. yds. wide sheetings; 1,600,000 "What Length Sheets?" pamphlets issued; sizes bed sheets for hospitals simplified 50 to 4; tests on 23 brands sheets being made Westchester County Institution; U.S. Shipping Board and Navy Department now specify 108-in. sheets.

#### AWNINGS.

Present market about 30,000,000 sq. yds. per year; conservative additional market available, 6,000,000 sq. yds.; Institute co-operating with National Tent and Awning Manufacturers' Association and Department of Commerce in securing information on which to base recommendations for standards and simplification of widths; consideration given fire, water and mildew proofing; use of awnings promoted by design contest and special articles.

#### OSNABURG IN THE HOME.

Suitability of osnaburg for household uses presented by U.S. Department of Agriculture and Institute; Sears, Roebuck & Co. featuring.

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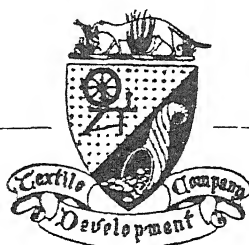
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# A MILL SURVEY

*as made by*

**The Textile Development Co.**

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**Practical and Scientific**

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Consists of an Analysis of the  
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of the Mill by a group of  
Practical Men.

IT

**RESULTS IN LOWER  
MANUFACTURING COSTS**

*These surveys have been made in*

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## **The Textile Development Co.**

*SIDNEY S. PAINE, President*

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BOSTON, MASS., U.S.A.**

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## COTTONS for SUMMER WEAR

NEW YORK TRIBUNE TRIBUNE - MAY 16, 1928



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**VAL DE FLORES** is the name of the new dress which is made of a delicate combination of pastel shades and is as soft as the breeze.

**THE FASHION OF FASHION** is the name of the new dress which is made of a delicate combination of pastel shades and is as soft as the breeze.



**LYON'S DESIGN** on silk and wool with French styling is the name of the new dress which is made of a delicate combination of pastel shades and is as soft as the breeze.



**FOOL AND COMFORTABLE** are the names of the new dress which is made of a delicate combination of pastel shades and is as soft as the breeze.



**FOR LADIES** and the name of the new dress which is made of a delicate combination of pastel shades and is as soft as the breeze.



**LYON'S DESIGN** on silk and wool with French styling is the name of the new dress which is made of a delicate combination of pastel shades and is as soft as the breeze.

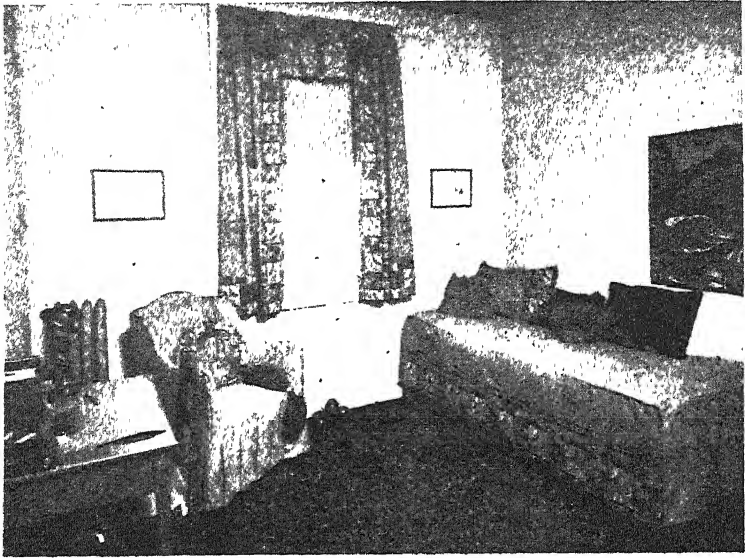


**VALOR FINE** is the name of the new dress which is made of a delicate combination of pastel shades and is as soft as the breeze.

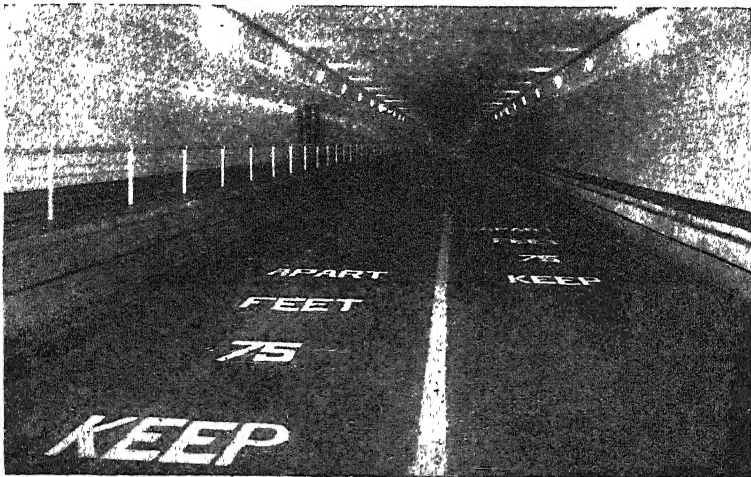
**LYON'S DESIGN** on silk and wool with French styling is the name of the new dress which is made of a delicate combination of pastel shades and is as soft as the breeze.

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**T**HE DELTA & PINE LAND COMPANY OF MISSISSIPPI owns and operates a group of cotton plantations in the Delta of Mississippi, upon which it produces annually an average of sixteen thousand bales of cotton, the staple of which is inch and three-sixteenths to inch and a quarter (Liverpool style) in length.

This Company offers to the trade any part of its production; will ship to match type, guaranteeing grades and staple. The Company will be glad to communicate with persons interested.

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## ADDITIONAL SUBJECTS STUDIED BY THE NEW USES SECTION.

## IMPORTANT CHANNELS FOR EDUCATING CUSTOMERS.

Methods of presenting to consumers cotton fabrics for wearing apparel and in the home; adult extension of work of U.S. Department of Agriculture, reaching 440,000 homes in 48 States; cotton fabrics furnished for club contests and advantages of cottons presented to 4-H Girls' Clubs, which include 600,000 girls of high-school age; over 1,000,000 girls and women receive classroom instruction in textiles and clothing. Institute presented advantages of cotton at State and annual conventions, supplied literature for classroom use and aided in making national programme.

## PRESENTATION OF COTTON FABRICS TO THE TRADE, PUBLIC AND PRESS.

Advantages of cotton fabrics, presented in 51 addresses, 18 exhibits, general press, household magazines, and to trade associations.

## CO-OPERATION WITH GOVERNMENT AGENCIES.

Committee from Departments of Commerce and Agriculture and Institute study new uses for cotton goods; Government offices co-operated with; Government textile purchases; Institute encourages responsible bidding on Government inquiries; Government purchased 9,200,000 sq. yds. cotton fabrics first nine months 1928.

## SPECIFICATIONS.

Institute aids in specifications for general Federal use; O.D. uniform cloth, O.D. legging fabric and cartridge bags for War Department; bedspreads and cotton bunting for Navy Department; pyroxylin-coated fabrics, fabrics for rubberizing, bed sheets, etc., for private industries.

## SIMPLIFIED PRACTICE.

Institute co-operated with Department of Commerce in simplifying cotton textiles for institutional uses, surgical gauze, and adhesive plaster; advantages of simplification in textiles.

## RESEARCH.

Research done by Institute at Bureau of Standards, including water, fire, and mildew proofing of fabrics; fabrics used in water-proofing concrete structures; road cleavage cloth; modified parachute cloth; one-wear collar; technical study of bed sheets; cotton fabrics for potato-barrel tops; cotton bagging for piece goods; rice bags, cotton-seed meal bags, and effect of different dopes and methods of applying to bagging of various constructions.

The following editorial from the *New Bedford Times* is an interesting comment on the work of one of the departments of the National Association of Cotton Manufacturers, Boston:—

"The return of cotton goods to favour, of which such pleasing signs are to be noted in scores of different connections to-day, represents the happy result of something besides mere chance and changing styles.

"It crowns the persistent efforts of people who planned three or four years ago to do something to bring back dress popularity to the old staple fabric that then seemed almost at the vanishing point so far as style vogue was concerned.

"The publicity department of the National Association of Cotton Manufacturers started the ball rolling back in 1925, and proceeded thereafter consistently with popularity-getters of various sorts, such as showings in shop windows, a travelling textile exhibit, etc., until the cotton vogue once more gained motion and momentum."

The National Association issued the following leaflet on June 15:—

### COTTON FORECAST.

*By Katrine Hooper.*

The bulk of next year's buying will be chosen from the more successful style items that are on the market at present. For this reason it is very important to study the lines that the department stores are offering to the consumer in the way of cotton, both in the main products and the accessories.

One of the interesting summer features for the household has been the chintz bedspreads and curtains to match. These have been extremely attractive and very reasonably priced. Light-weight summer quilts in old-fashioned chintz and percale, carrying out the idea of the patchwork affairs of our grandmothers' day, have also been well received.

There is no question of the success of cotton as a style fabric, in ensembles, coats and separate dresses. Models in the sports type, both plain and printed, are retailing from \$15.00 to \$49.50 in the more exclusive department stores, and at corresponding prices down the line. And they have no difficulty in selling. The situation can be analysed very favourably for another year. But it is essential that cotton be even more highly styled if it is to hold its present prestige.

Colour will continue to play an increasingly important part in successful styling. If the vogue for brilliant, warm yellows, reds and oranges continues to influence to scale, it will react to the advantage of cotton which can be guaranteed fast and clear. This will mean that beige will yield more and more to white as background. It will also help to hold the tendency towards a light range rather than dark. The all-year-round sunburn will be a contributing factor for the reason that white, either alone or with clear contrasting colours, sets off the fashionable brown skin much better than the faded pastels.

With the cotton dress as a leader, there is endless opportunity to develop the field for cotton underwear. Pyjamas were well received and well represented in many fields—negligee, beach and garden. But vests and shorts can be made to sell more universally. In the first place, it must not be forgotten that the average dress is thin enough to show the underwear. Even the most casual flapper isn't likely to wear loud-striped violet shorts under a light yellow dress—at least not more than the first time. The sudanette model brought out by Stewart & Co., Fifth Avenue, of a sleeveless tennis dress and underwear to match is an idea that can be carried a great deal further. If an enterprising dress manufacturer could be persuaded to do this in large quantities it could be made interesting.

The tendency towards a more intricate and feminine mode means increased interest in accessories. Pockets in a dress or coat ask for a handkerchief that will carry out the colour scheme. Sleeveless and backless dresses are given a flare in the addition of scarves and kerchiefs.

Summer shoe and bag sets are another field that has possibilities. Starting last year as a novelty, this season sees the fashion firmly entrenched. Coloured leather slippers are smart for the first time in many years. So it is safe to assume that the mode will hold and be in the volume class another year. While it may not use up so much yardage at so attractive a price, it has the advantage of focussing the consumer's attention on cotton, and in a line that is a definite style factor. The present price of shoes and bag together in the retail stores about equals the price of the dress, whether the latter lies in the \$10.50 range or the \$25.00. So while the cotton dress may not necessarily demand cotton accessories, the reverse is another story. Cotton shoes and bag demand a cotton background.

So sell them their shoes, bag, kerchief and hat. You won't have to worry about their buying anything but a cotton dress. Keep the women cotton-minded, and the stores will give them what they want.

The U.S. Government, through the textile division of the Department of Commerce, is energetically aiding in finding new uses for cotton, and recently Mr. E. T. Pickard, the chief of the division, reported that two new bulletins dealing with the present and potential use of cotton have been released. One entitled "The

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AUSTIN : : TEXAS

Awning " deals with the use of awning fabric- for commercial and residential buildings; the other, " The Citrus Tent," discusses the utilization of cotton cloth for fumigation tents in combating diseases of citrus fruit trees. Another bulletin, " Cotton in the Rubber Tyre Industry," is now ready for printing, while reports on the use of cotton in the aviation industry and cotton wall coverings are in preparation. A study is being made of the use of net wash bags in domestic washing machines and the utilization of cotton in Government establishments. There is a considerable potential use for a light-napped cotton cloth in the manufacture of shoe bags, which would be convenient containers for shoes in the home, and particularly for packing shoes for travelling, Mr. Pickard said. These would also serve as an advertising medium for the distributor, who could have the name of his firm printed on them. It was further suggested by various members of the committee that such bags might be provided for wringers on washing machines and coverings for electric fans and other household appliances, and that wiping cloths for automobiles, which would serve as an advertisement medium, could be distributed by automobile manufacturers or garages.

Would it be too much to expect similar European Government departments to follow the lead given by U.S.A.?

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### AMERICAN COTTON CROP.

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Summarizing all the reports received in this office there seems to be an absolute unanimity that this year the boll-weevils are present in larger numbers than last year, and that they are distributed over a larger area. The boll-weevil promises to be the most important factor in the season, though it will only be towards the end of July before one may be able to form some ideas of the likely damage. If July is hot and dry the weevil will be killed off, as last year, in large quantities, but if July is wet, then we may see high prices.

The crop is about a week later than normal. The acreage estimates indicate an increase of from 2 to 3 per cent. That, of course, can be more than counteracted by weevils or other events.

All the reports agree that the size of the crop is in the hands of the weather and that it is useless at this stage to endeavour to make any forecast whatsoever. The market is, and will be for a month, purely a weather market.

Care is necessary in view of the possibility of heavy boll-weevil damage, and spinners will do well to pay attention to the rainfall in July in the Cotton Belt, which will be the determining factor of future weevil development. Dry weather is wanted; wet weather means large weevil damages later on. A.S.P.

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## MARKET LETTERS.

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*Messrs. Harriss & Vose*, New York, have in their usual "Conspectus of the Cotton Market" for the week ending June 1, 1929, the following pithy analysis of the present situation:—

"Here, then, is a statistical picture of a normal cotton crop, as made up from the average of the past ten years:

Whatever the preliminary acreage estimate of July 8 may be, the 'average' crop revised upward 2.7 per cent. in the final figures. In the past ten years the revision has been downward only three times.

The abandonment is 3.7 per cent., from the revised figures.

The yield per acre is 155 lbs.

The reduction in the yield ascribable to boll-weevil damage is 15.8 per cent.

If the planted acreage this season should be approximately 49,000,000, as many think, and the picked acreage approximately 47,000,000, the average yield of 155 lbs. per acre would produce about 15,200,000 bales.

The average yield in the three worst boll-weevil years was 132.1 lbs. per acre. On 47,000,000 acres that would produce a crop around 13,000,000. The average yield of the remaining seven years of the last ten was 164.8 lbs. At that rate the crop would be 16,200,000.

For practical purposes, therefore, the 'normal expectation' of this crop may be set at 15,200,000 bales, and the probable range between 13,000,000 and 16,200,000. If it escapes from that range at either end it will be a phenomenal crop, not to be judged by average standards.

The 'normal' cotton crop, like the 'average man,' has no existence except in the imagination of the statisticians, but it may be useful to keep these figures in mind when studying the crop reports this season.

And regardless of the immediate market outlook, it strikes us that only a crop approaching the upper range given could in the long run be considered bearish at these price levels."

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*The Cochran Bureau*, Dallas, Texas, published on the 15th June the following:—

Acreage probabilities are changed but little since June 1st.

The weevil situation looks more serious, as reports daily indicate that the infestation is more general and more widespread than

before reported, and than at this season last year. In fact the localities reporting "heaviest infestation in years" or "more weevils than we have ever had at this season" are numerous. The high temperatures had in Texas this week, in conjunction with poor protection afforded by the plants, which are small in most areas, may effect some reduction of the next generation of weevils; however, since nights were cool, moisture plentiful and temperatures not unduly high no drastic check is likely. In the Central and Eastern belts the weather was altogether favourable for rapid multiplication and for survival of old weevils. Squaring is general in the Southern third of the belt and is beginning locally in the Southern fringe of the Northern third, providing the necessary environment for increase. Heavy damage is reported locally in Texas, Louisiana, Mississippi, and Georgia. It is urgent that hot dry weather predominate during the next few weeks; otherwise severe inroads on the crop may be expected.

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*The Fossick Bureau*, Memphis, made the following remarks in their letter of the 14th June:—

The foundation for a very large crop has been laid; stands are as good as in any year of the last five, the plant is healthy-looking, there is ample moisture over the entire belt and cultivation is fair; the use of fertilizer per acre will compare favourably with previous years and the quality is high, which is an important factor. Indications now point to an acreage approximating the record, if not exceeding it. The present condition of the crop would be brilliant for the end of May; the crop averages about two weeks late; this lateness can be overcome, and favourable weather during the remainder of June would go far towards overcoming it.

The good foundation, however, is no guarantee of the completed structure. The history of cotton growing is filled with disappointment along this line. There are many things that can happen to a cotton crop, to convert a brilliant promise into a dismal failure, but the one most to be feared is the boll-weevil. Assuming an acreage equal to the record—48,730,000 acres in 1926—which would mean an increase of about 3.8 per cent. compared with last year, and assuming average abandonment, the crop might range from 12,250,000 to 18,000,000 bales, within the range of yield per acre—124.5 lbs. to 181.9 lbs.—during the last ten years.

Several pointers suggest the wisdom of watching the boll-weevil very closely this year, always bearing in mind that damage is not likely to become apparent until late in July, and that June, July and August weather appears to be the most important controlling factor affecting increased infestation.

The weevil, owing to inviting weather, emerged from hibernation unusually early this year, and so far weather conditions have favoured activity; the early emergence will increase the number of generations of weevils, and therefore enlarges the possibility of maximum damage. The presence of weevil is noted in practically every section of the belt except the far West.

Government has a theory of a seven-year peak-to-peak weevil cycle, and has placed 1921 as a peak year—according to that 1928 would have been the next peak. 1921 may have been a peak year in Texas, but if yield per acre proves anything 1923 was the peak year in other States in which the weevil had, up to that time, obtained a foothold. If there is anything in the weevil cycle, it is not unlikely that weevil damage will be heavier this year than in 1928, and that the peak damage will occur in 1930—Texas excepted.

Government boll-weevil report, issued to-day, shows the highest percentage of emergence since 1924 at all but four reporting stations.

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## WORLD'S COTTON SUPPLY.

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*Bond McEnany & Co.*, New York, in their market letter dated 7th June, review with clarity the world's cotton supplies. They say:—

“At this point careful consideration may well be given to the now almost complete preliminary statistics of the past year's production of cotton in all the producing countries of the world; for these statistics clearly indicate that the world's crop of 1928 fell far short of what was generally expected a few months ago. According to a tabulation recently published by the Bureau of Agricultural Economics at Washington, returns from all but a few minor producing countries show an aggregate yield in 1928 of 25,111,000 bales of 478 lbs. net weight, as compared with 23,383,000 bales produced by the same countries in 1927. The Bureau further estimates that when all returns are in the total world's crop in 1928 will be found to have been 25,600,000 bales of 478 lbs. net weight, as compared with 23,800,000 bales in 1927. It appears, then, that there was a gain in world production in 1928 as compared with 1927 of only 1,800,000 bales, of which 1,523,000 bales represented the increase in the American crop alone, the rest of the world gaining no more than 277,000 bales. Particularly disappointing are the returns for China and India; for in China the crop of 1928 was 450,000 bales smaller than that of 1927, while in India early forecasts of an increase of 500,000 to 600,000 bales in the yield have had to be reduced to such an extent that the figure of the Bureau of Agricultural Economics indicates an increase of only 33,000 bales and even this insignificant increase may in the end disappear, since the latest report of the Indian Government estimates the total crop in India this year at only 5,638,000 bales of 400 lbs., against 5,871,000 bales last year. It may be added that in interpreting these figures of world production it is necessary to bear in mind that the figure for India includes 750,000 bales of 400 lbs. (about 600,000 bales of 478 lbs.) estimated to be spun into yarn in the homes of

the peasants, while the quantity similarly consumed in China is estimated at from 750,000 to 1,000,000 bales. On this basis, the quantity of cotton of all growths of the crop of 1928, available for mill consumption throughout the world, would be from 24,000,000 to 24,250,000 bales of 478 lbs. During the cotton year of 1927-1928, however, the world's mills, according to the International Spinners' Federation, actually consumed 25,540,000 running bales of all growths of cotton, a quantity equivalent to approximately 25,100,000 bales of 478 lbs. net weight. It follows, then, that if the world's total mill consumption for the current season of 1928-1929 proves to be as large as that for 1927-1928—an assumption the correctness of which is now scarcely open to doubt—it will exceed the 1928 world production available for mill consumption by at least 1,000,000 bales. This is the measure of the deficit to be made up by a corresponding increase in the 1929 production in the United States or elsewhere if the consumptive needs of 1929-1930 are to be met and the world's reserve supply of cotton is to be restored to the minimum quantity consistent with commercial safety.

As things stand to-day with the new American crop, the balance of probabilities would seem to be decidedly against the achievement in this country of the substantial increase in production just indicated as needed to assure the world's cotton industry a comfortable supply of raw material for 1929-1930."

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## STANDARD MARINE INSURANCE COMPANY,

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# EGYPTIAN COTTON

## JOINT EGYPTIAN COTTON COMMITTEE.

*President:* WM. HOWARTH.

*Vice-President:* H.E. AHMED ABDEL WAHAB BEY.

### *Egypt:* MEMBERS OF THE COMMITTEE:

H.E. Ahmed Abdel Wahab Bey, Under-Secretary of State,  
Ministry of Finance.

H.E. Emine Pasha Yehia, Cotton Exporter, Alexandria.

Dr. Lawrence Balls, Chief Botanist, Ministry of Agriculture.

H. M. Anthony, Director-General, State Domains Administration.

Fouad Bey Abaza, Director, Royal Agricultural Society.

Youssef Nahas Bey, General Secretary, General Agricultural  
Syndicate.

Constantin J. Choremi, President, Alexandria General Produce  
Association.

### *England:*

William Howarth, Managing Director, Fine Cotton Spinners  
and Doublers' Association, 6, St. James's Square, Manchester.

Lt.-Col. N. Seddon Brown, Managing Director, Amalgamated  
Cotton Mills Trust, Preston.

W. H. Catterall, 504-508, Corn Exchange, Manchester,  
Chairman of Directors, Drake Spinning Co. Ltd., Farnworth.

do. do. W. Mather & Co. Ltd., Bolton.

do. do. Butts Mills Ltd., Leigh.

Director, Bee Hive Spinning Co. Ltd., Bolton.

*France:* Roger Seyrig, Etabs. George Koechlin, S.A., Belfort.

*Germany:* Direktor A. W. Schutte, Crefelder Baumwollspinnerei,  
A.G., Crefeld.

*Italy:* Prof. Paolo Alberzoni, Via Gesù 7 Milan.

General Director of:

Cotonificio di Chiavenna & Laveno,

Cotonificio di Rovereto.

*Czecho-Slovakia:* Ing. Otto Pick, Firma E. G. Pick, Ober-  
leutensdorf.

Officially appointed substitutes:—

### *England:*

F. Wright, Joint Managing Director, Crosses & Winkworth,  
Consolidated Mills Co. Ltd., Bolton, and

Crosses & Heaton's Associated Mills Ltd., Bolton.

W. Heaps, Manager, Shaw, Jardine & Co. Ltd., Manchester.

G. Berry, Manager, Baytree Mills Ltd., Middleton Junction.

*France:* Julien le Blan, Palais de la Bourse, Lille.

*Germany:* Edmund Diltthey, Aug. Diltthey & Sohné, Mülfort.

*Italy:* Dr. Silvio Soldini, Cotonificio Cantoni, Via Brera 12, Milan.

*Switzerland:* Caspar Jenny, Messrs. Fritz & Caspar Jenny & Cie.,  
Ziegelbrücke, Glarus.

**EXTRACTS from the MINUTES of the JOINT  
EGYPTIAN COTTON COMMITTEE, held at  
the Palace Hotel, Brussels, 23rd May, 1929.**

There were present: Messrs. William Howarth (Chairman), (England), F. Holroyd (England), Lt.-Col. N. Seddon Brown (England), W. H. Catterall (England), A. W. Schütte (Germany), Edmund Dilthey (Germany), Roger Seyrig (France), Prof. P. Alberzoni (Italy), Otto Pick (Czecho-Slovakia), Caspar Jenny (Switzerland), Dr. W. Lawrence Balls (Egypt), W. Heaps (England), F. Wright (England), G. Berry (England), Dr. Silvio A. Soldini (Italy), Arno S. Pearse (General Secretary), John Pogson (Assistant Secretary).

At the commencement of the meeting COUNT JEAN DE HEMP-TINNE, President of the Belgian Cotton Spinners' Association, was in attendance, and extended a hearty invitation to all the representatives to attend the Dinner to be given the same night by the Belgian Association in honour of the visit of the International Cotton Committee to Brussels, and he also stated that H.M. The King of the Belgians would be pleased to receive not only the members of the International Committee, but also those members constituting the Joint Egyptian Cotton Committee.

Apologies for non-attendance were received from the Egyptian members of the Committee, who experienced great difficulty in arranging the necessary leave for this meeting as well as for the Barcelona Cotton Congress, and as the latter Conference was the more important one, they had decided to send only Dr. W. L. Balls for the purpose of discussing matters relating to humidity of cotton, and new varieties of Egyptian Cotton.

Apologies were also received from Mr. J. le Blan (France).

The Minutes of the previous meeting having already been circulated were approved and adopted.

### **HUMIDITY.**

The General Secretary presented statistics relating to the returns recorded during the last twelve months from the spinning mills of various countries. These showed that the percentage of excess moisture on dry weight (over  $8\frac{1}{2}$  per cent. regain) worked out to 0.460 against 0.551 in the previous year, and that four Alexandrian firms had been delivering excess fibre, i.e. less than  $8\frac{1}{2}$  per cent. moisture, against one firm in the previous year. It is satisfactory to know that since the recording of tests became an established custom, a great improvement in moisture content has shown itself. (For statistics on humidity see page 618.)

After discussion of the tables the Committee unanimously agreed, unless other data of a contradictory nature are meanwhile produced, to press at the forthcoming Barcelona Cotton Congress the resolution provisionally adopted at the Zurich Committee meeting on June 14 and 15, 1928, viz.:—

“That a maximum degree of moisture up to 9 per cent. regain be admitted, but where this limit is reached by any lot, the spinner to be entitled to claim from the shipper any excess over  $8\frac{1}{2}$  per cent. regain.”

The Italian Cotton Spinners' Association submitted to the meeting a table showing 147 tests representing 10,479 bales with an average moisture of 8.556 per cent. on dry weight which they said was due to the dryer climate in Italy as compared with England and most countries on the Continent.

A letter from the British Cotton Industry Research Association dated 22nd April, 1929, was read dealing with the effect of long storage on the humidity of Egyptian cotton, and the General Secretary was instructed to circulate the letter to the members of the Committee for the purpose of obtaining opinions upon the subject from various countries.

It was felt that the question was one that required years to solve, whilst the fixing of a standard of moisture should be finally settled at the Barcelona Congress.

Mr. A. W. SCHÜTTE thought it desirable that the Committee should aim at prohibiting entirely in coming years the damping of cotton in Egypt.

Dr. W. L. BALLS pointed out that at the present time the graders of cotton could not arrive at a proper comparison unless the moisture content was standardized.

It was recognized that it would require years of training of the buyers of cotton before such a measure would become feasible.

The CHAIRMAN mentioned that a delegation from the Alexandria General Produce Association desired to place before the meeting statistics obtained by them on the question of humidity tests made.

At this point a delegation from the Alexandria General Produce Association, consisting of Messrs. Carver, Lindemann and Birley, was admitted.

They submitted a circular printed in French dealing with the humidity tests carried out by the members of the Alexandria General Produce Association, which the General Secretary was requested to translate into English and issue to the members of this Committee.

The results obtained in Alexandria show that 2844 lots consisting of 219,159 bales contained the following percentages of moisture:

	per cent.
Sakellariadis ... ..	9.03
Ashmouni . . . . .	8.85
Zagora, Lower Egypt ... ..	8.98
Pilion ... ..	9.24

Mr. H. B. CARVER, who spoke on this matter, stressed the point that the Alexandria General Produce Association insisted that all tests should be taken at an official Testing House to be established at Alexandria and that Alexandria shipping weights should be recognized if the Alexandria shippers were to agree to any fixed standard of moisture.

The Alexandrian delegates pointed out that they had no power to discuss the question further than was stated in the official circular of the Association and that the final decisions would have to be reached at the Barcelona Cotton Congress.

The CHAIRMAN expressed the hope that on that occasion the officially appointed delegates of the Alexandria General Produce Association would be authorized to fix a standard of moisture jointly with the Cotton Spinners.

SUGGESTION FOR EXTENDING REPRESENTATION OF ALEXANDRIA  
GENERAL PRODUCE ASSOCIATION ON JOINT EGYPTIAN  
COTTON COMMITTEE.

Mr. H. B. CARVER pointed out that the Egyptian members of the Joint Egyptian Cotton Committee were entirely appointed by the Egyptian Government, and although Mr. C. J. Choremé and H.E. Emin Pasha Yehia are exporters, they are nominated by the Egyptian Government and not by the Alexandria General Produce Association.

In the opinion of the Mission they thought that it would be desirable if the Alexandria General Produce Association as such were invited to appoint a few representatives on the Joint Egyptian Cotton Committee.

The CHAIRMAN stated that the Joint Egyptian Cotton Committee was part of the International Cotton Federation, and that it had not the powers to make any modifications in the Statutes that had been agreed upon, but the General Secretary would take note of the suggestion and bring it forward in the proper quarters.

MIXING LAW.

The Alexandria Mission also explained the views of the Alexandria General Produce Association on the Mixing Law, which is at present before the Mixed Courts, but the Chairman stated that this meeting had not power to discuss the matter, and after having submitted their statement (which is incorporated in the full minutes) the delegation of the Alexandria General Produce Association withdrew.

DELEGATES TO BARCELONA CONGRESS FROM  
ALEXANDRIA GENERAL PRODUCE ASSOCIATION.

The General Secretary read the following letter from the President of the Alexandria General Produce Association:—

*(Translation of letter from the Alexandria General Produce Association.)*

Alexandria, 7th May, 1929.

Dear Mr. President,

I have the honour to write you on the following:—

You know that the question of humidity of cotton will be discussed at the forthcoming Congress in Barcelona.

We do not think that this important question could be discussed in plenary meetings of the Congress, but that it should be discussed by a sub-committee which will meet at Barcelona during the Congress sittings. This sub-committee will be composed of delegates nominated by the spinners and delegates nominated by the shippers from Alexandria.

Only the conclusions of the sub-committee will be submitted to the plenary meetings of the Congress.

Our Association has already appointed as probable members of their delegation the following:—

C. J. Choremi	H. E. Finney
H. B. Carver	H. Lindemann
G. Allemann	G. Pilavachi
K. P. Birley	

We trust that our suggestion will receive your approval, and remain, etc.

(Signed) C. J. CHOREMI, *President*."

Mr. Birley had intimated previously that he would be unable to attend the Congress.

It was agreed that the delegates appointed should be invited to the Congress, but that we should have to follow the usual system of holding our meetings.

It was decided that the various questions dealt with by this Committee would be included in the Agenda for the Barcelona Congress, and the members of the Committee were requested to ascertain from their Associations whether they had any other subject they wished to bring forward.

The General Secretary was instructed to acquaint the Alexandria General Produce Association with the decision arrived at on the question of Humidity in Egyptian Cotton.

### NEW VARIETIES OF COTTON.

Dr. W. L. BALLS spoke on the new varieties of cotton and gave a digest on the New Strains of Uppers as described in the Technical and Scientific Bulletin by Mr. C. H. Brown, copies of which had already been circulated.

Permission was granted for this note to be printed in the next issue of the International Cotton Bulletin (see p. 621).

The CHAIRMAN stated as his experience and that of many of his friends was that the new variety "Maarad" pulled extremely well, but had many disappointing features in the working of it, particularly as regards strength and regularity.

Dr. Balls referred to the note which had been prepared on "Maarad" cotton by Capt. R. Sennitt, copies of which had been circulated (see p. 630).

In Dr. Balls' opinion "Maarad" or an equivalent with high-yielding powers was bound to spread. It was curious that spinners of Egyptian cotton frequently did not like "Maarad," but the spinners of American cotton accustomed to using Pima were quite satisfied with it.

Giza No. 7, grown in the extreme South of Egypt and in the Northern Delta, outcropped "Maarad," and was a "bread and cheese" Sakel. He stated that it could beat "Maarad" in yield, and it may be that in four or five years Giza No. 7 might replace "Maarad." "Maarad" had a very unfortunate introduction, as the promoters of it were trying at the outset to obtain too high a level of prices.

Mr. OTTO PICK stated that Continental spinners lamented the falling off of the Uppers' staple year by year, and that they as large users of it were at a complete loss to know what to buy. From one season to another deterioration took place. They certainly wanted no shorter cotton than Uppers of two years ago.

Dr. BALLS remarked that Mr. Pick's complaint came when the condition of Uppers had been at its worst. Uppers had already started improving, and in the present year there would be 10,000 acres under a new Upper of a pure stock and better than the best of old type and 5,000 acres of a new Upper of about Pillion staple but stronger. Next year they might begin to exterminate the old stock of Upper seed, and they were trying to apply more effectually the mixing law in the ginning factories of Upper Egypt where certain irregularities had come to light.

#### JUTE PACKING.

The General Secretary referred to the correspondence which had taken place with regard to improved Hessians for the packing of Egyptian cotton between the International Federation and the Association of Jute Spinners and Manufacturers, Dundee, and the Indian Jute Mills Association, Calcutta.

Dr. Balls pointed out that the samples sent from Calcutta had certainly proved very unsatisfactory, as in spreading them out on a green-baize table a large number of fibres had adhered.

#### NEXT MEETING.

It was decided that the next meeting of the Joint Egyptian Cotton Committee should take place at Barcelona prior to the holding of the Congress, and Monday, the 16th September, 1929, was fixed for this purpose.

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*Cotton Merchants*

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ESTABLISHED 1863.

## MOISTURE TESTS OF EGYPTIAN COTTON—2nd Tabulation.\*

## SUMMARY OF RETURNS FROM CZECHO-SLOVAKIA, SWITZERLAND, ENGLAND AND GERMANY.

Report by ARNO S. PEARSE, General Secretary, International Cotton Federation, Manchester, prepared for the Meeting of the Joint Egyptian Cotton Committee, Brussels, May 23, 1929

*This Summary comprises all returns received up to May 1, 1929.*

No. of Tests	No. of bales represented by tests	True Ave.	Previous year's figs	Percent of excess moisture on dry weight (over 8½ per cent regain)		Percent of excess fibre on dry weight (under 8½ per cent regain)	
				True Ave.	Previous year's figs	True Ave.	Previous year's figs
8	285	0.610	0.521	—	—	—	—
8	277	0.996	0.258	—	—	—	—
5	130	0.533	0.526	—	—	—	—
13	370	0.673	1.178	—	—	—	—
1	30	0.650	†	—	—	—	—
24	873	0.070	0.399	—	—	—	—
16	528	0.002	0.847	—	—	—	—
158	5,579	0.036	0.516	—	—	—	—
38	1,532	0.635	0.803	—	—	—	—
20	780	0.287	0.812	—	—	—	—
4	121	0.771	1.594	—	—	—	—
4	100	0.790	0.962	—	—	—	—
1	30	0.150	0.747	—	—	—	—
2	90	1.303	1.050	—	—	—	—
8	210	0.467	0.917	—	—	—	—
31	1,029	0.521	0.736	—	—	—	—
25	789	—	0.198	0.210	—	—	—
8	270	0.755	0.465	—	—	—	—
16	390	—	—	0.155	0.087	—	—
68	2,387	0.467	0.516	—	—	—	—
9	331	0.088	0.677	—	—	—	—
24	798	0.469	0.948	—	—	—	—
40	1,544	—	0.150	0.141	—	—	—
4	108	0.477	0.332	—	—	—	—
4	159	0.272	0.408	—	—	—	—
35	1,003	—	0.200	0.101	—	—	—
1	34	1.120	1.000	—	—	—	—
12	263	0.776	0.516	—	—	—	—
4	110	0.390	0.884	—	—	—	—
3	150	1.110	†	—	—	—	—
Totals	..	594	20,300	0.460	0.551	(averages)	

† No return.

This first table contains 28 firms from which we had returns at the Zurich Meeting, June 14, 1928. Of these 19 show less moisture contents than last year, and where any increases have taken place they are only trivial. This rather leads one to believe that, owing to the knowledge amongst the cotton shippers that spinners were watching the moisture contents, the shippers have added less water to their cotton than formerly.

The average has fallen from 0.551 to 0.460 per cent.

## ANALYSIS PER SHIPPER.

With a view to finding out who are the shippers from whom the mills receive the smallest excess of moisture, we have eliminated all those firms from which we have less than eight tests. The list in order of merit from the moisture point of view is given below.

An analysis per variety was not possible as only very few forms stated these. In last year's tabulation Uppers showed 0.2 per cent. less moisture than Delta.

\* The first tabulation of this kind was submitted to the Zurich Meeting of the Joint Egyptian Cotton Committee.

## ANALYSIS PER SHIPPER.

(List of "Order of Merit.")

The following four firms show **excess of fibre** over  $8\frac{1}{2}$  per cent. dry weight

Firm No.	No. of Tests	No. of bales represented	Excess fibre less than $8\frac{1}{2}$ per cent. on dry weight.
	25	789	0.210
	16	390	0.155
	40	1,544	0.141
	35	1,003	0.101

All the others show **excess moisture** over  $8\frac{1}{2}$  per cent. dry weight, viz

		Excess moisture
16	528	0.002
158	5,579	0.036
24	873	0.070
9	331	0.088
20	780	0.287
8	210	0.467
68	2,387	0.467
24	798	0.469
31	1,029	0.521
8	285	0.610
20	780	0.635
13	370	0.673
8	270	0.755
12	263	0.776
8	277	0.996

The tabulation of last year showed only one firm with excess of fibre delivery; this year we have four, and four more are practically at par, viz.,  $8\frac{1}{2}$  per cent.

The affiliated associations have received from us a key to the above tabulation, from which Spinners will be able to trace the names of the "dry" shippers. Interested Spinners should apply to their respective organisation.

## ITALY.

## Tabulation of Moisture Tests by the Italian Cotton Spinners and Manufacturers' Association.

Submitted to the Joint Egyptian Meeting, 23rd May, 1929.

Firm No	Uppers				Delta				Total			
	Tests	Bales	Wet	Dry	Tests	Bales	Wet	Dry	Tests	Bales	Wet	Dry
1	12	1,100	7.732	8.384	7	290	7.682	8.319	19	1,390	7.721	8.360
2	13	1,269	8.014	8.719	3	90	7.676	8.333	16	1,359	7.991	8.694
3	6	150	8.941	9.821	7	350	8.958	9.843	13	500	8.953	9.836
4	—	—	—	—	15	1,200	7.775	8.428	15	1,200	7.775	8.428
5	—	—	—	—	4	200	7.982	8.678	4	200	7.982	8.678
6	8	1,300	7.384	8.182	2	60	6.975	7.500	10	1,360	7.796	8.441
7	—	—	—	—	3	90	7.410	8.003	3	90	7.410	8.003
8	—	—	—	—	2	50	8.080	8.790	2	50	8.080	8.790
9	7	550	7.754	8.386	10	790	7.834	8.501	17	1,340	7.802	8.454
10	2	300	7.377	7.969	3	90	7.500	8.100	5	390	7.405	7.998
11	—	—	—	—	11	600	7.960	8.663	11	600	7.960	8.663
12	—	—	—	—	2	60	7.915	8.593	2	60	7.915	8.595
13	—	—	—	—	22	1,640	7.734	8.378	22	1,640	7.734	8.378
14	4	100	8.422	9.140	4	200	9.067	9.675	8	300	8.852	9.497
	52	4,769	7.867	8.535	95	5,710	7.895	8.563	147	10,479	7.883	8.556

Taking  $8\frac{1}{2}$  per cent. regain, the moisture excess works out to :

Uppers	Delta	Total
0.036 %	0.066 %	0.053 %



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## A Preliminary Note on Some New Strains of Uppers.

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*By C. H. BROWN, B.Sc.*

Work on the improvement of the Upper Egyptian cotton crop has now reached a point at which it can be stated with certainty that a rapid improvement will take place in the general quality of cotton grown in Upper Egypt. The importance of this to all concerned with cotton is so great, particularly in view of the rapid acreage increase at present taking place in the southern districts of Upper Egypt, that a preliminary note on the strains at present propagated appeared justified. These results are necessarily tentative, as a full locality analysis was included in the 1928 crop only, but the merits of the strains are so marked that even with only the results available at present it can be stated confidently that they will displace the existing Ashmouni variety. Further results will be therefore mostly useful in deciding the exact increased value per acre that may be expected from them, and the exact limits within which each of them may most profitably be grown.

The strains considered are Giza 2, Giza 3 and Giza 7, and account is here taken only of their performance in Upper Egypt. They have all been tried in the Delta also, and it appears that Giza 7, almost certainly, and Giza 3 possibly, may also be grown as Delta cottons. It is hoped to prepare in a year's time a similar note on the results of new strains in the Delta.

All these three strains originated by single-plant selections made in Upper Egypt from the ordinary Ashmouni and Zagora crops, their pedigree charts being shown with the graphs. The exact origin is a matter of no importance as it is perfectly clear that all these new types must be judged on their merits, irrespective of origin. It may be presumed that all originated as natural hybrids, the female parent probably being the mother population in which they were found, and the male parent, in the case of the latter two at least, a longer stapled type.

So marked is the divergence of most of the selections now being made in Egypt from previously known types that in all cases it has been found impossible to assume beforehand any locality preference, even, with the long-stapled types, to the extent of saying whether they should be considered as Uppers or Delta cottons. This is now so clear that as a matter of course all such selections will in future be tried in both Upper Egypt and the Delta. The present note is confined to the Upper Egyptian results, both because these cottons were first tried there and because the Upper Egyptian varietal situation is much simpler. Next year an attempt may be made, with the presentation of the Delta results, to summarize the whole position of the cotton varieties grown in Egypt.

The three types under consideration have been put into propagation in the order named, the former, because of its general

## EGYPTIAN COTTON

similarity to previous Uppers, as New Ashmouni, and the latter two under their selection names of Giza 3 and Giza 7. It is proposed in the future to retain these selection names for all cottons which do not roughly conform to a previously known varietal type.

The propagation history of the strains is given in the following table, which includes areas grown in the Delta. Giza 7 is in the present year being propagated principally at Sakha, to take advantage of the low seed-rates possible on the State Domains. These propagation-rated are hampered in the early stages by the necessity of reserving what are then comparatively large quantities of seed for testing in yield chequers at a normal seed rate. The low propagation ratio of Giza 3 from 1926 to 1927 was due to uncertainty as to how far an Upper with such a staple would be acceptable. It will be noted that no such uncertainty is now being displayed over the much longer stapled Giza 7.

## AREA IN FEDDANS (1,038 acres).

					Giza 2	Giza 3	Giza 7
1924	..	..	.	..	1/10	1/5	—
1925	..	..	..	..	1	1	—
1926	..	.	.	..	10	10	1/5
1927	..	..	..	..	170	82	2
1928	..	..	..	..	1,200	580	19
1929	..	..	..	..	10,000	5,800	450

The yield results so far obtained are given below. Statistical "errors" have in no case been worked out, owing to the shortage of computing staff. All results are from chequers of at least five repetitions. In the early years chequers were taken only at Giza and Fashn, neither of which are very typical. The Giza soil does not appear to be very suitable for cotton, and has the curious effect of flattening out yield differences observed in other localities. Fashn is not typical because it is farmed in a manner altogether above the average. More recently the scope of the yield chequers has been widened, so as to include localities in the far south, beyond the present cotton region. Many of these too are typical only of themselves, and in all cases yield figures have been supplemented by observations taken by the staff during growth.

The outstanding difficulty in yield chequers is to obtain a uniform stand of plants, but in 1928 the total stands of all the chequers were counted, and are here given as percentages of the stand of Giza 2. Giza 7 appears to have suffered in some localities from bad stands, due principally to damaged seed, and it may be surmised that with a full stand its yield would have been even better.

## KANTARS OF SEED—COTTON PER FEDDAN

1925						Fashn	
Zagora M.	..	..	..	..	..	10.57	(% stand given for 1928)
Giza 3	..	..	..	..	..	10.11	
1926							
Zagora M.	..	..	..	..	..	5.12	10.72
Giza 2	..	..	..	..	..	5.61	11.01
Giza 3	..	..	..	..	..	5.76	10.38

KANTARS OF SEED—*continued.*

1927				Giza	Fashn	Mansafis	Maragha
Zagora M.	..	..	..	5.85	9.90	8.72	8.25
Giza 2	..	..	..	6.27	9.61	9.15	8.51
Giza 3	..	..	..	5.62	8.41	8.32	8.72
Giza 7	..	..	..	5.46	6.18	—	—
1928	Giza			Ashmant	Fashn	Mansafis	Maragha
Zagora M.	..	5.26 (95)		5.35 (104)	9.49 (101)	8.12 (103)	4.68 (117)
Giza 2	..	5.05 (100)		5.34 (100)	9.83 (100)	8.55 (100)	4.40 (100)
Giza 3	..	5.00 (93)		4.26 (108)	8.19 (93)	8.42 (100)	5.18 (111)
Giza 7	..	5.42 (86)		3.70 (108)	6.72 (94)	8.18 (105)	4.44 (86)
1928				Armant			Komombo
Zagora M.	..	..	..	..	..	7.55 (106)	4.93 (101)
Giza 2	..	..	..	..	..	7.33 (100)	4.74 (100)
Giza 3	..	..	..	..	..	7.88 (106)	5.33 (99)
Giza 7	..	..	..	..	..	7.78 (107)	4.98 (92)

Zagora Malaki (Royal) the Ministry's previous best strain of Uppers, is here given as a control.

These figures are of course to be considered with the ginning outturn percentages, given below.

1925																			Fashn					
Zagora M.	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	33.2					
Giza 3	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	34.0					
1926																		Giza	Fashn					
Zagora M.	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	32.4	33.3					
Giza 2	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	32.7	33.3					
Giza 3	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	31.6	32.5					
1927																		Giza	Fashn	Mansafis	Maragha			
Zagora M.	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	33.5	33.8	34.6	34.5			
Giza 2	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	33.7	34.0	34.7	35.0			
Giza 3	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	32.5	33.5	33.9	34.7			
Giza 7	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	30.9	32.1	—	—			
1928																		Giza	Ashmant	Fashn	Mansafis	Maragha	Armant	Komombo
Zagora M.	32.0																			31.6	35.7	33.8	33.8	33.4
Giza 2	.. 32.4																			34.2	35.9	33.2	34.3	33.1
Giza 3	.. 31.5																			33.7	34.7	32.7	33.2	31.8
Giza 7	.. 29.8																			32.4	32.9	33.0	33.0	30.7

The Fashn G.O.T. of Zagora Malaki looks anomalous.

It will be noticed that Giza 2 has a G.O.T. similar to or slightly higher than the previous Uppers type, while both Giza 3 and Giza 7 lose on this point. The effect is not, however, sufficiently serious to alter their relative value in their district, as may be seen from the following summary of the 1928 results.

*South of Upper Egypt* (under "basin" irrigation systems) average of Maragha, Armant and Komombo.

				Seed cotton yield	G.O.T.	Lint Yield
				Kt. per Fed.	Rolls lint per Kt. of seed cotton	Kt. per Fed.
Zagora Mal...	..	..	..	5.72	106.6	6.10
Giza 2	..	..	..	5.49	105.6	5.80
Giza 3	..	..	..	6.13	102.4	6.27
Giza 7	..	..	..	5.73	99.2	5.69

*North of Upper Egypt* (under "perennial" irrigation system)  
average of Mansafis, Fashn, Ashmant and Giza.

					Seed cotton yield	G.O.T.	Lint yield
					Kt. per	Rolls lint per Kt.	Kt. per
					Fed.	of seed cotton	Fed.
Zagora Mal...	..	..	..	..	7.05	104.2	7.35
Giza 2	..	..	..	..	7.19	107.7	7.75
Giza 3	..	..	..	..	6.47	104.9	6.78
Giza 7	..	..	..	..	6.19	99.8	6.18

NOTE.—In general, cotton yields are higher in the basin areas than in the perennial. The above difference in the opposite direction is entirely due to the chance inclusion of some high-yielding farms in the northern zone, and some low-yielding farms in the southern.

These average results, considering actual lint yield, show fairly uniform yields in the southern zone, with Giza 3 at the top, while in the northern zone Zagora Malaki and Giza 2 stand markedly above the others, Giza 2 being actually the highest yielder.

The lint quality must now be taken into consideration. Roughly Giza 2 appears to be of equal value to Zagora Malaki, Giza 3 worth about Pilon price (1 dollar on Uppers with a Sakel-Upper difference of 10 dollars) and Giza 7 very nearly equal to Sakel (2 dollars off Sakel with a 10 dollars Sakel-Upper difference).

Clearly these lint qualities put Giza 3 and Giza 7 as markedly more valuable per feddan than the short-stapled strains in the southern zone. In the northern zone the position is not so clear. Obviously Giza 2 must replace Zagora Malaki, with the competitive possibilities of the long-stapled strains to be determined later. A considerable part of the difficulty of predicting the relative future of these cottons is the variation in the relative premiums of Uppers and Sakel on American. The only thing that can with certainty be foreseen is the replacement of a lower quality staple by a better, where the better is at least an equal yielder, or the replacement of a lower yielder by a higher where the higher yielder is at least of equal staple. These two premises would make certain the replacement of ordinary Uppers by Giza 3 in the south, and by Giza 2 in the north, leaving the ability of Giza 7 to replace either dependent on the premium which its staple can command.

For the present Giza 2 will be propagated in the perennial areas (north of Deirout) under the name of New Ashmouni, and Giza 3 and Giza 7 side by side in the basin areas (south of Deirout).

The detailed results on lint quality, from which the above value estimation has been made, are given below:—

*Halo-Lengths.* Measured on from 300-500 sub-basal seeds taken at random from the chequers, commencing in 1927:

1927						Giza	Fashn	Mansafis	Maragha
Zagora M.	..	..	..	..	..	29.9	30.1	29.7	28.2
Giza 2	..	..	..	..	..	30.4	30.3	30.4	29.2
Giza 3	..	..	..	..	..	32.4	33.1	32.3	31.0
Giza 7	..	..	..	..	..	—	—	—	—

1928						Giza	Ashmant	Fashn	Mansafis	Maragha	Armant	Komombo
Zagora M.	..	28.2	30.0	29.7	29.5	27.5	29.4	29.4	29.8			
Giza 2	..	28.0	29.8	30.3	29.3	28.1	29.7	30.4				
Giza 3	..	31.1	32.7	33.4	32.6	31.6	32.1	31.9				
Giza 7	..	33.0	34.1	34.4	35.3	32.7	33.9	33.4				

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## GRADERS' OPINION.

Mr. C. Ross, of the British Egyptian Cotton Co., who is now engaged by the Cotton Research Board every winter to give his opinion on strains under trial, has seen these for several years now, and it was on his recommendation when it was in the single-plant stage that Giza 7 was originally propagated. More recently several Alexandria experts and some Lancashire ones have handled these cottons, the first two of which are now in sufficient bulk to be sold through the ordinary commercial channels. It is therefore impossible to give full details of the opinions expressed, which may be summarized as follows.

Giza 2 is a typical Upper, slightly lighter in colour than previous types, and is generally judged to be slightly better in both length and fineness. It is not, however, sufficiently different for the replacement of previous types by it to attract any particular notice. If it can be confined to the district between Cairo and Assiut it should give a very even-running and acceptable Uppers staple.

Giza 3 on its first appearance was very enthusiastically greeted. It is of distinctly longer staple than Uppers, and no such cotton had previously been seen grown in Upper Egypt. On occasions it has been stated that it could replace a poor Sakel. More recently Giza 3 has generally been graded side by side with Giza 7, which has monopolized most of the attention. Giza 3 is now generally compared with Pilion, what differences there are being mostly in favour of Giza 3 for staple strength.

Giza 7, on the halo-length figures above, is from 1-2 mms. longer than Giza 3, and although still 1-2 mms. shorter than Sakel it is generally stated that it can only be compared with Sakel.

Apparently Giza 7 has a fineness and lustre fully equal to those of Sakel. Its lighter colour and slightly shorter staple make it sometimes distinguishable, but in some grading tests it has not been separated from a group of Sakels with which it was being compared.

## SPINNING REPORTS.

These may be divided into the regular spinning results on 5 lb. samples obtained from the Fine Cotton Spinners' Association Research Station and various results of tests made by Lancashire mills. The former are here reproduced in full for these strains and any comparable varieties which may be used as standards. The latter are numerous; some are only expressed in the form of opinions, and where figures are given there is considerable variation in counts spin. These results are therefore not given in full. The names of mills also are not given, as it is not known how far the firms concerned would agree to publications of their test results. In all cases, however, the tests have been made by reliable mills, some of them very well known.

FINE COTTON SPINNERS' ASSOCIATION RESEARCH STATION,  
BOLLINGTON.

Results are given in the form of waste percentages, and count + strength product. Samples from the same chequer plot, by



(2)					At 75's CXS	At 57's CXS
Zagora Malaki Fashn	..	..	..	..	1,450	1,915
Giza 2 Fashn	..	..	..	..	1,400	1,740
Giza 3 Giza	..	..	..	..	1,580	1,890
Giza 3 Fashn	..	..	..	..	1,660	1,835
Giza 3 Maragha	..	..	..	..	1,565	1,845
Commercial Upper	..	..	..	..	—	1,595
Commercial Pilon	..	..	..	..	—	1,825

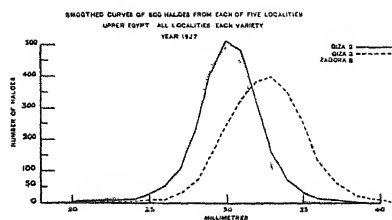
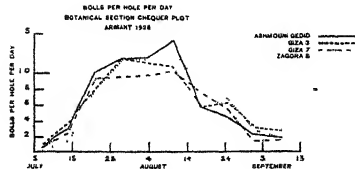
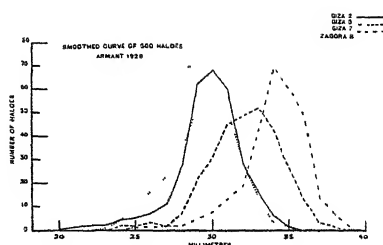
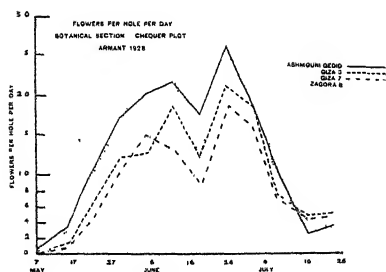
(3)					At 40's CXS	At 50's CXS
Zagora Malaki Fashn	..	..	..	..	2,073	1,845
Giza 2 Fashn	..	..	..	..	2,168	1,907
Giza 3 Fashn	..	..	..	..	2,179	2,007

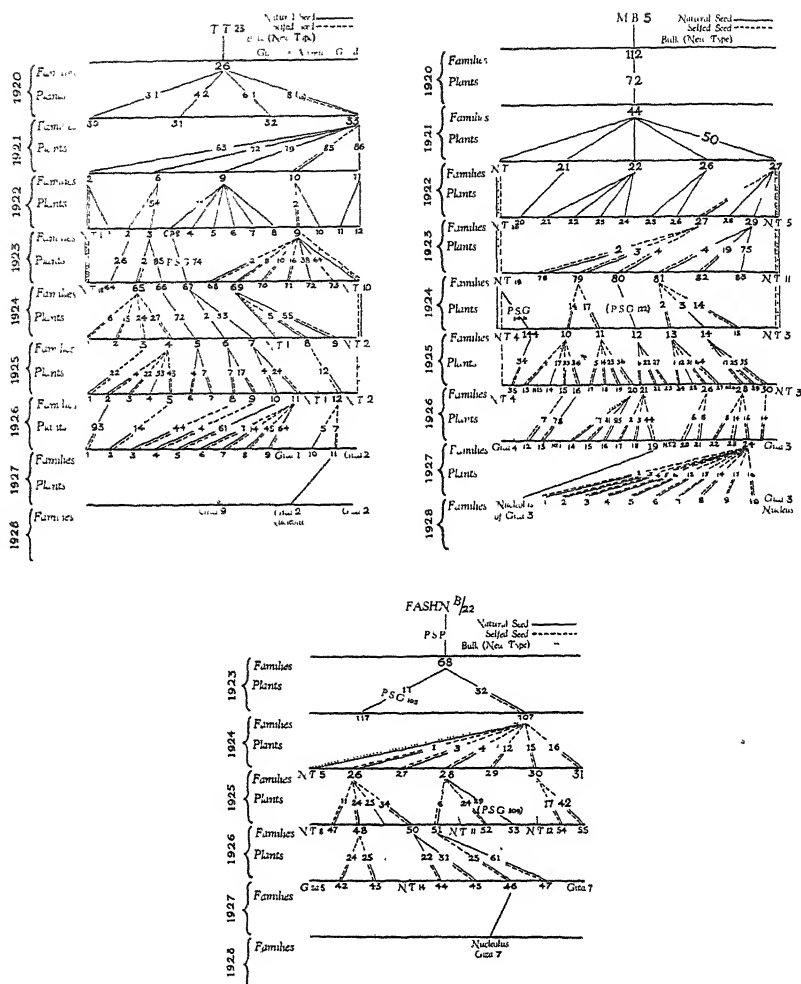
(4)					At 40's CXS	At 50's CXS
Giza 3 Maragha	..	..	..	..	2,160	2,170
Commercial Pilon	..	..	..	..	2,150	2,170

(5)						At 60's CXS
Giza 7 Gemmeiza	..	..	..	..	..	2,175
Commercial Sakel	..	..	..	..	..	2,035

(6)					At 50's Twist CXS	At 70's Wett CXS
Giza 7 Gemmeiza	..	..	..	..	2,630	2,410
Commercial Sakel	..	..	..	..	2,820	2,450

(7)		At 58's	At 72's	At 101's	At 112's	At 120's
Giza 3 Armant	..	1,940	1,550	1,140	1,090	1,030
Giza 3 Maragha	..	1,820	1,490	715	—	—
Giza 7 Gemmeiza	..	2,290	2,230	1,585	1,515	1,445
Commercial Sakel	..	2,280	2,160	1,500	1,540	1,440





## Maarad Cotton.

By R. SENNITT.

Maarad Cotton was brought to the notice of the Joint Egyptian Cotton Committee at its meeting at Zurich in June last year (1928) by Dr. W. Lawrence Balls in his Paper on "New and Old Varieties of Cotton in Egypt," in which he stated that it was his opinion that "Maarad Cotton was destined to become within a few years the predominant variety in the Delta on account of its high yield," and in view of its importance of the future it is considered that a brief history of this new variety of cotton would be of interest.

In 1918 and 1919, at the request of the late Mr. Victor Mosseri, Technical Adviser and Director of Agricultural Research to the Royal Agricultural Society of Egypt, a small amount of American Pima seed was brought from Arizona.

Pima Cotton itself, an Egyptian type of cotton grown in the south-western parts of the United States of America, is claimed to be the result of "mutation."

In 1901, seed of Mit Afifi Cotton was imported into America, and planted in New Mexico. In 1906, individual selections were made at Yuma, in Arizona, which gave rise in 1908 to two progeny rows, totally different in type from the parental variety and from each other. One of these progeny rows gave rise to the Yuma Variety, which shows a striking resemblance to the Egyptian Nubari, which appeared in Egypt three or four years earlier.

In 1910, a single plant of marked individuality occurred in a field of the Yuma Variety at Sacaton, Arizona, to which the Pima Variety owes its origin.

The substitution of Yuma by Pima, which is superior to any of the preceding varieties both in yield and fibre, took place from 1916 to 1919.

The first Pima seed which arrived in Egypt in 1918 was planted in experimental rows at the Experimental Farm of the Royal Agricultural Society at Bahtim. In 1919, a second lot of seed from 38 bolls picked from different plants was brought from Arizona and planted out in the pure-line breeding field at the Society's Farm at Dukki, near Cairo. The fact that several separate lines were obtained later from these bolls indicates that the original stock was not so pure as had been promised. Pedigree selection was carried out during the following years, as a result of which several pure strains have been produced that have not yet been propagated on a large scale, because some other strains appeared sufficiently homogeneous to justify their tentative multiplication and propagation. These latter strains were produced from 100 individual selections which were planted at Bata Experimental Farm in 1921. In 1922, 1923 and 1924, further selections were made from the plant-row families and increased plots obtained. By studying the yield and field records and selecting only those which gave the best yield combined with the most satisfactory gradings, best field reports, earliness, vegetative growth, regularity in height, types of plants, statistical records, etc., the number of strains were considerably reduced in 1925, when seed sufficient to sow 700 acres was distributed to cultivators in five different provinces in the Delta, and the average yield obtained was 5 cantars (500 lbs. lint) per acre, against 3.5 cantars (350 lbs. lint) of Sakel.

In 1926, 4,500 acres were cultivated in 40 different localities spread over six provinces in Lower Egypt; the average yield obtained was 4.5 cantars per acre, which compared very favourably with that of Sakel, which in the same localities gave 3 to 3.25 cantars that year.

In 1927, over 4,00 sacks of seed were distributed to sixty-four cultivators in Lower Egypt on 110 farms, the total area sown being 12,500 acres. The yield was again satisfactory, being one cantar per feddan more than Sakel grown in the same districts.

Last year (1928), the yield obtained was as good, and in many instances better than in any previous year, many cultivators on good soil obtaining as much as 6 cantars per acre.

The State Domains Administration grew 200 acres of Maarad Cotton in 1928 on the Sakha Estate, and the result was so satisfactory, being 5 cantars per acre compared with 4 cantars of Sakel, that 700 acres are being cultivated this year (1929) on the State Domains land.

The number of acres under Maarad Cotton in the Delta this year (1929) is between 30,000 and 35,000 acres, which at a low estimate should give from 120,000 to 140,000 cantars, or from 17,000 to 20,000 bales.

The good yields of Maarad Cotton which have been obtained have been confirmed in the Commercial Cotton Variety Tests carried out by the Agronomic Section of the Ministry of Agriculture in several different localities in Lower Egypt, the following table giving the average yields of the fine cotton varieties included in these Tests during the last four years:

Variety		1923	1926	1927	1928	General		Compared with Sakel at 100
						Average	Rank	
Maarad ..	..	5.90	5.89	4.30	6.04	5.53	1	131
Foadi ..	..	5.49	5.77	4.27	6.22	5.44	2	129
Pilion ..	..	—	5.71	4.18	6.08	5.32	3	126
Nahda ..	..	5.39	5.37	3.81	5.43	5.00	4	119
Casuli ..	..	5.26	5.02	3.33	5.29	4.72	5	112
Sakel Com ..	..	4.79	4.19	3.27	4.73	4.24	6	100
Sakel Dom ..	..	4.88	4.25	3.19	4.55	4.22	7	100
No. 310 ..	..	4.80	4.45	3.05	4.43	4.18	8	99

It will be seen that, compared with Domains Sakel—the best Sakel grown in the country—Maarad Cotton gave a superior average yield of 31 per cent., over a period of four years.

One of the most interesting features of the tests is that as one comes from the north to the south of the Delta the superiority in yield of Maarad over Sakel becomes more obvious. In the north, from figures supplied by the Ministry of Agriculture, it is shown that there is an increase in favour of Maarad of 15 per cent.; in the middle Delta 32 per cent.; and in the South up to as much as 50 per cent.

This increased yield of Maarad is considered to be due to the following reasons:

- (1) Better fruiting development and more bolls per fruiting-branch.
- (2) Auxiliary bolls are not shed to the same extent as in Sakel.
- (3) Heavier weight per boll.
- (4) It gives a bigger first picking, and is not relatively so badly attacked by the pink boll-worm.

Other advantages of Maarad over Sakel are that it is longer in lint length (41 to 42 mms. halo length), gives a higher ginning outturn, and has less "Mabrooma" (cotton attacked by pink boll-worm).

The importance of keeping up the purity of the seed of this new variety of cotton is fully realized, and the Royal Agricultural

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SHEBIN-EL-KOM, KAHR-EL-SHEIKH, TEH-EL-BAROUD &amp; BARRAGE

*Upper Egypt:*FAYOUM, WASTA, FASHN, DEIROUT, BIBEH, ABOU-KERKAS, BELEIDA, BOUSH  
MELLAWI, BENI-MAZAR, SAMALLOUT, ABOUTIG, SOHAG

# ALEXANDRIA COMMERCIAL CO.

(S.A.)

*Head Office:* 9, Rue Stamboul, ALEXANDRIA, Egypt.*Telegraphic Address* "COMMODATE."**Board of Directors:**OSWALD J. FINNEY, *Chairman and Managing Director.*S. LAGONICO, *Vice-Chairman.*

B. DELLAPORTA.

H. CLARK.

H. E. FINNEY.

E. H. DUKES.

R. E. WILLIAMS

**Ginning Factories:** MEHALLA-KEBIR, ZIFTEH and MINIEH.*Foreign Correspondents:*

Reynolds & Gibson, Liverpool, England.	N. V. McFadden's Cie., Rotterdam, Holland.
W. H. Midwood, Liverpool, England.	
Geo. H. McFadden & Bro., Philadelphia, U.S.A.	James Heye, G.m.b.H., Bremen, Germany.
Raffaele Rietti, Milan, Italy.	Dir. Friedrich Kusel, Leipzig, Saxony.
Société d'Importation et de Commission, Havre, France.	Gosho Kabushiki Kaisha, Osaka, Japan.
Joski et Cie., Ghent, Belgium.	Gosho Kabushiki Kaisha (Ltd.), Bombay, India.
Alfieri & Peyer, Zurich, Switzerland.	

**Buying Agencies in the principal centres of Lower and Upper Egypt  
and the Sudan.**

# REINHART & CO.

*Cotton Merchants*

ALEXANDRIA (EGYPT)

*Telegraphic Address:* "REINHART, ALEXANDRIA"



Central Buying Agency Up-Country  
at ZIFTA (Gharbieh)

*Affiliated Company*

"The National Ginning Company of Egypt S.A."  
with Ginning Factory at ZIFTA (Gharbieh)



*First-Class Agents  
in all the Spinning  
Centres of the World*

Society has undertaken to do this as far as is possible in the future in co-operation with owners of large estates by roguing their fields of any off-type plants that may occur and controlling the pickings over as large an area as can be done with the staff at its disposal, and by discarding as unfit for sowing the seed from any locality that shows signs of mixture in the field.

It has been arranged that Maarad Cotton can only be sent for ginning to certain factories which are controlled by the Society; every consignment of seed-cotton from the fields is examined in the factory store previously to ginning, and if any signs of deterioration or mixture are noted, the seed from these "ginning lots" is discarded as unfit for sowing, and is sold for pressing into oil.

The stores, gins, elevators, shakers seeds, heating machinery, etc., in the factory are thoroughly cleaned before the ginning of this variety takes place, to remove as far as possible all foreign seeds to prevent mixture taking place; the ginning itself is supervised, the resulting seed is cleaned by "aspirators," and in some instances by sieves especially prepared.

Seed for planting is also only taken from the higher grades of seed-cotton (fully good, fair to good, and above), and every seed-lot is examined, and discarded if there are any signs of the presence of off-type seeds.

In addition to the main commercial crop, the Technical Section of the Royal Agricultural Society after several years of pedigree selection (between 2,000 and 3,000 plants of this variety alone have been studied individually both in the field and in the laboratory annually) has obtained 5 or 6 new pure strains from Maarad Cotton which have been graded as having strength and lustre equal to that of Sakel, combined with the other characteristics of Maarad.

From strain tests carried out at the experimental farms, their yields are better than the commercial Maarad, and they are in the process of being increased, with the object, if their superiority in lint yield is maintained, of eventually replacing the existing commercial stock.

Among these new strains, Nos. M368, M33A and M10-403 are the most important. They have been botanically described, and each has proved a distinct type, the latter strain being especially interesting. It was obtained from a single short plant, quite different from anything else produced from Maarad; it is early in maturity, has excellent vegetative and fruiting branches, is very prolific, and has been described as an "ideal cotton plant," from the plant-breeder's point of view.

To facilitate the propagation of Maarad Cotton, the Maarad Cotton Company was formed in 1926, consisting of several of the leading cotton firms in Alexandria, which had the right to dispose of the lint, but the control of the seed remained with the Royal Agricultural Society. Last year it was arranged that Maarad Cotton should be put on the open market, and any firm that wished to buy this variety from the cultivators could do so, and sell the lint to spinners abroad, on condition that the seed was sold back to the Royal Agricultural Society for distribution the following year.

This year (1929) the cotton firms connected with the Maarad Cotton Company are showing an increased interest in this variety of cotton by offering to do all they can to assist in distributing the seed to the growers in Egypt, and by making it known to the spinners abroad.

Since 1922 samples of Maarad have been submitted to the leading commercial houses and graders in Alexandria for their opinion with regard to its commercial value, and they have considered that it is a fine, long, regular cotton with a good appearance, but it was thought that the strength was not equal to that of the best Sakels, although the strength is improving as time goes on.

The general opinion was that it was a desirable cotton, and if the yield was maintained that it would be suitable both from the cultivators' and spinners' point of view.

In 1925, samples of this variety were taken to Manchester and shown to spinners interested in fine cottons, and they were without exception favourably disposed towards it, their only objection being that the price was too high at the time, but that if it could be sold at a price slightly under Sakel it would be taken up and become a commercial success.

This opinion was confirmed last year when thirty bales of Maarad, consisting of each of the ten types, were sent to England to be tested at the Fine Cotton Spinners' Experimental Department and at other mills in the Manchester district, where it could be spun in the ordinary way.

Spinning tests have also been carried out on the Continent and in America, the resulting reports being even more favourable than those received from England.

As is usually the case when a new variety is put on the market, the spinners do not wish to adopt it until they are assured that :

- (1) There will be a regular and sufficient supply in the future.
- (2) It will not deteriorate in the future in the same way that that many other varieties have done in the past.
- (3) It will be on the open market, and not the monopoly of any particular firm or firms, and that it can be obtained at reasonable prices.

With regard to the supply, there is every reason to believe that it will be increased rapidly in the future. The growers want it on account of its high yield compared with all other varieties grown in the Delta.

Everything possible that can be done to prevent its deterioration will be carried out by the technical staff of the Royal Agricultural Society, and as it is on the open market it is considered that there is no fear that the prices for it in the future will be unreasonable, especially as the grower can afford to sell it at a certain price below Sakel and still obtain a profit for himself.

Taking everything into consideration, it is felt that Maarad Cotton will meet the requirements of both the cultivator and the spinner, and be of benefit to all concerned.

## PROPOSED TARIFF ON EGYPTIAN COTTON IMPORTS INTO U.S.A.

Mr. C. T. Revere, partner of Munds & Winslow, one of the largest futures houses of New York, writes on this question some very illuminating remarks in his report of June 8, 1929, viz. :—

“ In the light of the Tariff Bill now before Congress, we think it timely to enter a protest against the suggestion to place a high duty of importation of foreign cotton, particularly Egyptian cotton. It is true that such a proposal would have the support of a goodly representation from the minority as well as the traditional protectionists in Congress.

Some of our soundest economic thinkers, who were advocates of high protection in the days when we were trying to build up industrial production and extend buying power in a home market, take the view that a high tariff for this country is now an anachronism with little justification for its existence. We have an industrial capacity more than sufficient for domestic needs, and we are seeking export outlets. The foreigner cannot buy except through payment by gold shipments, services, exchange of goods, or sale of securities. Gold is not available in volume, and services represent a small item. If we build up a high tariff wall, preventing or reducing the entry of goods from abroad, we are faced with the necessity of lending to foreign buyers in order that they may take our raw materials and surplus industrial output. This process cannot go on for ever.

It would be an absurdity to place a tariff on 200,000 bales or more of Egyptian cotton when we consider the questionable benefit to American growers and the great loss entailed in buying power from abroad.”

## CONSIGNMENT OF GINNED COTTON BY VARIETIES RECEIVED AT ALEXANDRIA TO DATE DURING THE COTTON SEASON 1928-29.

(Quantities expressed in Cantars)						
(Source : Ministry of Finance, Cairo)						
From September 1, 1928, to June 12, 1929						
Forwarded by	Sakelds	Ashmuni & Zagora	Pilion	Other Kinds	Scarto	Total
Lower Egypt :						
Beheira :						
Railway ..	474,352	65,225	61,224	12,711	3,509	617,021
Water ..	97,306	8,789	9,658	1,080	28,669	145,502
Total ..	571,658	74,014	70,882	13,791	32,178	762,523
Daqahliya :						
Railway ..	447,642	48,157	4,691	17,197	11,828	529,515
Water ..	—	—	—	—	—	—
Total ..	447,642	48,157	4,691	17,197	11,828	529,515
Gharbiya :						
Railway ..	1,121,300	337,536	205,839	219,014	37,439	1,921,178
Water ..	118,312	6,365	24,237	13,260	20,035	182,209
Total ..	1,239,612	343,901	230,076	232,250	57,138	2,102,977
Minufiya :						
Railway ..	25,468	81,199	32,703	10,161	1,903	151,434
Water ..	—	3,517	1,946	208	367	6,038
Total ..	25,468	84,716	34,649	10,369	2,270	157,472

## EGYPTIAN COTTON

CONSIGNMENT OF GINNED COTTON, etc.—*Continued*

(Quantities expressed in Cantars).

(Source: Ministry of Finance, Cairo).

From September 1, 1928, to June 12, 1929

Forwarded by	Sakelds	Ashmuni & Zagora	Pilion	Other Kinds	Scarto	Total
Qalyubiya :						
Railway ..	23,521	228,207	32,158	5,484	1,250	290,620
Water ..	18,596	89,279	4,520	10,813	1,823	125,031
Total ..	42,117	317,486	36,678	16,297	3,073	415,651
Sharqiya :						
Railway ..	189,400	139,205	38,577	25,998	3,549	396,729
Water ..	—	—	—	—	1,480	1,480
Total ..	189,400	139,205	38,577	25,998	5,029	398,209
Total of Lower Egypt :						
Railway ..	2,281,683	899,529	375,192	290,565	59,478	3,906,447
Water ..	234,214	107,950	40,361	25,361	52,374	462,020
Total ..	2,515,897	1,007,479	415,553	315,946	112,129	4,368,467
Upper Egypt :						
Asyut :						
Railway ..	—	834,752	—	1,679	735	837,166
Water ..	—	203,236	—	—	2,080	205,316
Total ..	—	1,037,988	—	1,679	2,815	1,042,482
Beni Suef :						
Railway ..	—	256,270	—	578	802	257,650
Water ..	—	381,530	—	—	4,101	385,631
Total ..	—	637,800	—	578	4,903	643,281
Faiyum :						
Railway ..	—	354,187	—	—	4,613	358,800
Water ..	—	—	—	—	—	—
Total ..	—	354,187	—	—	4,613	358,800
Giza :						
Railway ..	—	5,368	—	—	1	5,369
Water ..	—	35,418	—	—	197	35,615
Total ..	—	40,786	—	—	198	40,984
Girga :						
Railway ..	—	186,009	—	—	237	186,246
Water ..	—	—	—	—	—	—
Total ..	—	186,009	—	—	237	186,246
Minya :						
Railway ..	—	809,987	—	47	2,978	813,012
Water ..	—	487,309	—	19	4,083	491,411
Total ..	—	1,297,296	—	66	7,061	1,304,423
Total of Upper Egypt :						
Railway ..	—	2,446,573	—	2,304	9,366	2,458,243
Water ..	—	1,107,493	—	19	10,461	1,120,156
Total ..	—	3,554,066	—	2,323	19,827	3,578,399
Governos :						
Railway ..	—	—	—	—	6	6
Water ..	—	—	—	—	—	—
Total ..	—	—	—	—	6	6
Grand Total :						
Railway ..	2,281,683	3,346,102	375,192	292,845	68,850	6,364,696
Water ..	234,214	1,215,443	40,361	25,380	63,112	1,582,176
Total ..	2,515,897	4,561,545	415,553	318,225	131,962	7,946,872

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**EXPORTS OF EGYPTIAN COTTON.**


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*(Up to 5th June, 1929, from particulars supplied by the Ministry of Finance, Cairo).*

The following is the order of importance on 5th June, 1929, of the Egyptian cotton-consuming countries:—

	cantars	bales	Ratio per thousand
England .. ..	2,310,774	314,874	350·39
U.S.A. .. ..	1,208,821	163,695	183·30
France .. ..	861,894	116,549	130·69
Italy .. ..	457,322	61,907	69·35
Germany .. ..	385,972	52,007	58·53
Russia .. ..	330,891	44,819	50·18
Switzerland .. ..	291,095	39,194	44·14
Japan .. ..	261,175	35,487	39·60
Spain .. ..	157,902	21,423	23·94
Czecho-Slovakia .. ..	139,383	18,735	21·13
Poland .. ..	60,226	8,076	9·13
Belgium .. ..	47,439	6,411	7·19
Austria .. ..	42,798	5,794	6·49
China .. ..	9,828	1,330	1·49
Hungary .. ..	6,629	899	1·01
Portugal .. ..	5,592	763	0·85
British India .. ..	4,903	669	0·74
Holland .. ..	3,338	452	0·51
Greece .. ..	2,547	369	0·39
Sweden .. ..	1,681	230	0·25
Palestine .. ..	549	78	0·08
Other countries .. ..	3,953	532	0·62
	<u>6,594,712</u>	<u>894,293</u>	<u>1000·00</u>

On June 12 the totals stood: Cantars 6,717,511, Bales 910,868.

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**GOVERNMENT COTTON STOCKS.**


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The Council of Ministers authorized, at its meeting on June 3, 1929, the Ministry of Finance to sell gradually by weekly auctions the cotton held by the Government (339,662 cantars), in exactly the same way as is adopted for the cotton raised by the State Domains.

The Minister of Finance was also empowered to replace the sales from the crop warehouses in Alexandria. One thousand bales were offered at the middle of June. It was found that the quality had hardly deteriorated.

*Messrs. P. Augustino & Co.* state in their circular of 6th June that the intentions of the Government as regards purchase from the current crop are not yet known, but that the withdrawal from the market of even a small quantity of useful cotton of this year's growth is likely to prove a strengthening factor, if only by making buyers who require these grades depart from their usual hand-to-mouth policy.

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### SUDAN COTTON CROP.

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According to estimates issued in April, 601,700 cantars Sakel may be expected.

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### FINAL EGYPTIAN COTTON CROP.

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The Ministry of Agriculture has published, on June 3, the final estimate of the 1928-29 crop. The totals are:—

	Cantars		Cantars
Sakellaridis .. ..	2,533,307	Yield per feddan ..	3.17
Other varieties .. ..	5,313,845	Do. .. ..	5.66
Total .. ..	7,847,152	Average yield per feddan	4.51
as against:—			
Sakellaridis .. ..	2,390,015	Yield per feddan ..	2.99
Other varieties .. ..	4,494,102	Do. .. ..	4.79
Total .. ..	6,884,117	Average yield per feddan	3.96

The Scarto has to be added.

Last season, according to Reinhart & Co.'s circular, about 159,000 cantars were produced.

J. G. Joannides & Co. add 213,000 cantars for Scarto to above figures and arrive at a total of 8,060,000 cantars.

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## Bulletin Concerning the Condition of Cotton Crops during the month of May, 1929.

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*(Published by the Ministry of Agriculture, Cairo.)*

### NUMERICAL ESTIMATION OF THE CONDITION OF THE CROP.

In the system of notation employed 100 is taken to represent an average condition of the crop reported on in each division of the country. This average is calculated from the crop results of the preceding ten years.

The figures given below represent forecasts of the final condition of the crop considered. They are liable to modification in future bulletins in the event of the occurrence of factors influencing the present crop prospects.

Percentage of normal average yield:—

		Sakellaridis		Other varieties	
		May	April	May	April
Lower Egypt ... ..	...	99	—	98	—
Middle Egypt ... ..	...	101	—	102	—
Upper Egypt ... ..	...	—	—	99	—
Egypt ... ..	...	99	—	100	—

STATE AND PROSPECTS OF THE CROP (*summarized from reports received from the Inspectors of the Ministry of Agriculture*).

The weather was generally mild, though rather hot on many days, which favoured growth. In spite of this the plants did not make up for the retardment in growth which affected it in its early days, owing to unfavourable weather conditions. The effects of the heavy rains which fell on the 29th and 30th May are not yet known. The water supply was adequate during the month. The work of thinning, manuring and hoeing is still going on. Resowing of the late-sown areas in the Northern Delta is over, while early-sown ones in Upper Egypt have begun forming buds. Flowering and boll formation have been noticed in the markazes of Luxor and Esna in the areas which were sown in the early days of January.

The cut-worm has attacked scattered areas in the provinces of Lower Egypt and in Minia Province. The attack is more widely spread than last year, and though it did not affect the crop as a whole, yet certain areas had to be resown, while others were sown anew.

Cotton-worm eggs have been noticed in Daqahlia Province in the early half of the month, and in the other provinces of Lower Egypt in the last week of it, but were immediately collected.

Attacks by aphids were confined to few areas in the provinces of Gharbia and Kaliubia.

REPORT ON THE STATE OF IRRIGATION (*April 21 to May 20, 1929*).  
(*Source of information: Ministry of Public Works.*)

*Lower Egypt:* The summer rotations quite regularly continue at the rate of six days' working and 12 days' stopping in the cotton zones, and at the rate of five days' working and ten days' stopping in the sandy zones. The state of drainage is generally satisfactory.

*Upper Egypt:* Distribution of water continued according to the summer rotation established in each circle of irrigation.

Prevention of irrigating "Sharaki" from the 1st May, as well as irrigating bersim from the 10th of the same month, helped towards the abundance of water for the "Sefi" cultivation.

The state of drainage is generally good.

## EGYPTIAN GOVERNMENT'S FINANCIAL AID TO SMALL FARMERS.

With a view to helping the small farmers, the Government decided early in June to constitute an "Agricultural Reserve," consisting of:—

(a) A sum of £4,000,000 to be used for loans.

(b) The proceeds of the Government Cotton Stocks, which are to be sold.

(c) The annual income from the cotton tax.

Sums will be advanced to the farmers at the commencement of the season against cotton received.

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MARKET LETTERS.

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*Messrs. G. D. Economou & Co.*, Alexandria, write on the 20th June:—

The idea is deep rooted amongst people that the difference between Sakellaridis and Ashmouni and Sakellaridis and American must shrink, and everyone is doing his best to bring this about. In these circumstances one can hardly expect any change in the situation without the advent of some new factor, which for the present could only come in the form of unfavourable news on the new crop, and we should not be surprised to receive disquieting reports in the more or less near future, as during this period of the year there are always scares with regard to the crops, but until then extreme patience should be the order of the day.

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*Messrs. J. C. Joannides & Co.*, Alexandria, in their letter of the 18th June, write as follows:—

Not much has changed in textile conditions since last summer, but sentiment. And this latter factor is a very powerful one in creating markets one way or the other. Credit has also gone down, and credit is the basis of trading without which we would not be able to sell even half the world's present production.

Our own market reflects these factors very accurately, and the present stagnant prices and lifeless movements cannot change for the better unless some very powerful new factor changes market sentiment. Only a crop failure can now influence the trading mind, since it seems hopeless to expect that financial and trade conditions will change radically within the next few months. Even the panacea of Government intervention may fall flat after the first day's excitement. Under the circumstances, it is advisable to reduce commitments to the minimum and await coming events with an open and unprejudiced mind, free to act as best should when the future appears more clearly to our mind's eye.

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*Maison G. D. Sarris*, Alexandria, report in their letter of the 20th June as follows:—

*The Crop:* Favourable weather has set in and the crop is making good progress.

In Upper Egypt, where the crop is estimated to be delayed by 10 to 15 days, flowering is slowly becoming fairly general.

However, the leaf worm is now reported from all over the country.

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*The Spot Market:* The first auction held for the sale of the Government stocks resulted in the disposal of about 400 bales at prices round July futures.

The turnover during the week has been sluggish, sales averaging rather less than 1,500 bales daily, with the demand remaining the same as in previous weeks. Premiums are unchanged.

*Crop Movement and Alexandria Stocks by Varieties* (in bales):—

	Sakels	Ashm./Zag.	Pillion	Sundries
Carry-over on the 1st Sept. . .	93,530	51,615	4,883	9,038
Arrivals up to the 12th June ...	347,225	629,480	57,317	62,098
Total into sight ... ..	440,755	681,095	62,200	71,136
Exports up to the 12th June ..	299,289	556,107	43,702	27,455
Stock on the 12th June ... ..	141,466	124,988	18,498	43,681

*Messrs. P. Augustino & Co.*, Alexandria, in their letter of the 20th June, state:—

American crop news have been favourable, this encouraging bears to attack the market aggressively, and there is no doubt that the market is now more or less at the mercy of some large bear operators who are dominating. Many people are speaking now of a price of \$30. There is hardly any bull support noticeable, on the contrary many bulls must have been tired and forced out of the market by the very heavy decline which we have had during the last two three months.

*Messrs. Reinhart & Co.*, Alexandria, report on the 20th June as follows:—

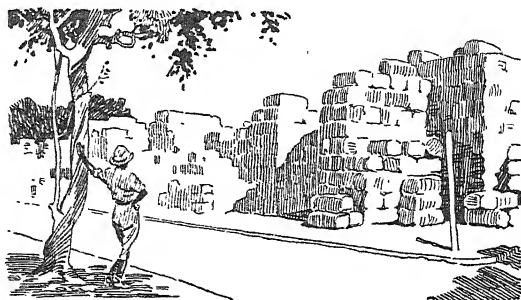
Mill demand has been good during the last week and the declining prices enabled exporters to execute numerous orders. Abundant offers on the spot market, however, neutralized this demand, which at any other moment, would have brought about higher prices.

The first auction sale of Government cotton took place on Wednesday. Of 1,000 bales formed by 22 lots offered, 316 bales have been sold. Prices, ranging between \$31 $\frac{3}{4}$  and \$32 $\frac{1}{2}$ , are considered relatively high for cotton stored during such a long period. 451 bales were withdrawn by the Government, the prices offered having been judged unsatisfactory. 233 bales, representing four lots, attracted no offers at all by the buyers at Minet-el-Bassal.

*New Crop*: The favourable temperature of the last few days has been very beneficial to the development of the growing crop. The plants seem to be in a strong and healthy state.

Water is abundant and cultivators are satisfied with the present rotations.





## East Indian Cotton.

The Government issued on May 4, 1929, the following final estimate of the cotton crop of India:—

### FINAL ESTIMATE OF THE COTTON CROP OF INDIA.

	1928-29 (Provisional Estimates)		1927-28 (Final Figures)*		1926-27 (Final Figures)*	
	(1,000 acres)	(1,000 bales)	(1,000 acres)	(1,000 bales)	(1,000 acres)	(1,000 bales)
Bombay† .. ..	7,627	1,338	7,763	1,801	6,914	1,289
Central Provinces and Berar .. ..	4,972	1,301	4,796	1,235	4,864	977
Madras† .. ..	2,467	534	2,123	447	2,231	388
Punjab† .. ..	2,825	616	2,067	602	2,803	599
United Provinces† ..	715	255	643	199	809	258
Burma .. ..	315	56	326	67	447	73
Bengal† .. ..	79	18	78	20	77	25
Bihar and Orissa† ..	78	14	77	14	79	14
Assam .. ..	44	17	45	15	46	15
Ajmer-Merwara .. ..	44	21	42	14	43	15
North-West Frontier Province .. ..	17	4	11	2	30	5
Delhi .. ..	2	1	2	1	4	1
Hyderabad .. ..	4,019	895	3,631	951	3,267	808
Central India .. ..	1,301	245	1,263	234	1,297	223
Baroda .. ..	793	70	806	124	761	124
Gwalior .. ..	645	107	585	115	649	107
Rajputana .. ..	465	123	422	97	404	78
Mysore .. ..	76	23	81	25	97	25
Total .. ..	26,484	5,638	24,761	5,963	24,822	5,024

NOTE.—A bale contains 400lbs. of cleaned cotton.

\* These are revised estimates as finally adjusted by provincial authorities.

† Including Indian States.

‡ Excluding certain feudatory states which report an area of 46,000 acres with a yield of 11,000 bales, as against 49,000 acres and 17,000 bales last year.

The detailed figures according to *trade descriptions* are given in the following table:—

Descriptions of Cotton	Acres (Thousands)		Bales of 400 lbs. (Thousands)		Yield per Acre (lbs.)	
	1928-29	1927-28	1928-29	1927-28	1928-29	1927-28
Oomras :						
Khandesh .. ..	1,339	1,452	284	307	85	85
Central India ..	1,946	1,848	352	349	72	76
Barsi and Nagar*	3,962	3,792	791	970	80	102
Hyderabad Gaorani						
Berar .. ..						
Central Provinces	4,972	4,796	1,301	1,235	105	103
Total .. ..	12,219	11,888	2,728	2,861	89	96
Dholleras .. ..	3,031	3,072	380	858	50	112
Bengal-Sind :						
United Provinces ..	715	643	255	199	143	124
Rajputana .. ..	509	464	144	111	113	96
Sind-Punjab .. ..	2,236	1,591	542	456	97	115
Others .. ..	85	84	16	16	75	76
Total .. ..	3,545	2,782	957	782	108	112
American :						
Punjab .. ..	961	750	187	219	78	117
Sind .. ..	29	15	6	3	83	80
Total .. ..	990	765	193	222	78	116
Broach .. ..	1,226	1,274	145	244	47	77
Coompta-Dharwars ..	1,782	1,726	394	327	88	76
Westerns and Northern	1,789	1,534	341	221	76	58
Cocanadas .. ..	241	214	46	39	76	73
Tinnevelhes .. ..	623	568	165	148	106	104
Salams .. ..	211	181	37	34	70	75
Cambodias .. ..	370	287	160	123	173	171
Comillas, Burmas and other sorts .. ..	457	470	92	104	81	89
Grand Total .. ..	26,484	24,761	5,638	5,963	85	96

\* Includes the whole of cotton grown in the Non-Government areas of Hyderabad.

## EXPORTS.

The exports of raw cotton from India by sea to foreign countries in the last five cotton years (September to August) were as follows (in thousand bales of 400 lbs. each):—

Countries	1923-24	1924-25	1925-26	1926-27	1927-28
	Bales (1,000)	Bales (1,000)	Bales (1,000)	Bales (1,000)	Bales (1,000)
United Kingdom .. ..	288	216	153	85	215
Germany .. ..	209	230	153	204	277
Belgium .. ..	257	238	210	159	302
France .. ..	173	180	175	112	212
Spain .. ..	136	60	71	53	67
Italy .. ..	602	482	388	272	376
China .. ..	243	355	521	253	264
Japan .. ..	1,384	2,101	1,995	1,582	1,326
Other Countries .. ..	158	136	109	110	101
Total .. ..	3,450	3,998	3,775	2,830	3,140

The exports for the seven months of the season 1928-29, i.e., from September, 1928, to March, 1929, amounted to 2,209,000 bales, as compared with 1,637,000 bales in the corresponding period of the previous year.

Last year the commercial crop worked out to 5,655,000 bales, almost 300,000 bales less than the Government figure. Generally the Government figure is lower than the commercial crop.

### COTTON PRESSED IN ALL INDIA.

In 1910 the International Cotton Federation suggested to the India Office the establishment of a regular monthly census of the bales ginned and pressed, analogous to the U.S. Bureau of the Census Report. In India the presses are easier to control than the ginneries. The introduction of these returns took several years before they became anything like complete, but now the figures offer certainly a reasonable comparison with the previous year. The latest tabulation in thousands of bales is as follows:—

	From April 20, 1929, to May 24, 1929	From May 23, 1929, to April 19, 1929	From Sept. 1, 1928, to May 24, 1929	Same time last year
Madras ...	97	52	241	202
Bombay ..	130	139	750	772
Sind ...	18	24	178	120
Bengal .	6	6	19	33
U.P. ..	1	3	203	158
Punjab ..	58	108	722	728
C.P. ...	34	52	464	425
Berar ...	75	97	964	923
N.W.F. Provinces ...	—	—	1	—
Ajmer-Merwara ...	3	8	44	38
Burma ...	1	—	33	31
Jodhpur State ...	1	2	6	6
Rajpipla State ...	—	2	16	17
Jaipur State ...	—	1	4	14
Baroda State ...	16	18	76	95
Nabha State ...	2	8	31	27
Holkar State ...	10	26	148	119
Hyderabad State ...	28	34	384	473
Faridkote State ...	1	2	11	4
Barwani State ...	—	1	15	13
Bhawnagar State ...	5	8	50	—
Nawanagar, Porbander, Ratlam, Bhopal and other States	42	37	123	87
Total ...	528	628	4,483	4,285

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## EAST INDIAN COTTON USED IN U.S.A. MILLS.

---

Why do the U.S.A. mills use any East Indian Cotton? The answer is because it pays them. The "interchangeability" of the best kinds of Indian cottons, of which some 2,000,000 bales are grown annually, is demonstrated in a very clear way by Japan, China, Belgium, Italy, Austria, Czecho-Slovakia and Germany. Several Japanese mills use some small percentage of Indian cotton in their mixture, even for 30's. There are seasons when the parity of Indian cotton is low, and it is then when alert cotton spinners in the above countries turn their attention to this growth, but other countries do not make all the possible use of the East Indian cotton which they might.

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## MARKET LETTER.

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### MONSOON REPORT.

The Government monsoon forecast, based on meteorological data from many points of the Globe, and proved to be fairly reliable by past experience, predicts a fairly normal course for this year, with neither deficiency nor excess of rain, except in the Peninsula proper, for which there are indications of an excess.

In actual fact, the development has not been quite so regular, with some initial deficiency in the central parts of the country and a considerable excess in the extreme East. According to latest news, however, the central parts too seem to have had some additional rain now, enough to allow of agricultural operations to be started.

Those parts of the Cotton Belt where Bengal, Sind and American seed cotton are grown are, to a varying extent, irrigated from canals, and on the fields which are in reach of canals ploughing and sowing is generally completed when the monsoon breaks. Not so, of course, on fields away from canals. They depend on the monsoon entirely, and even the canals require replenishing from rainfall if they are to hold a sufficient water supply for the whole of the growing season. Those early-sown fields in the above districts are at present progressing satisfactorily, though canals are not sufficiently full yet. In the non-irrigated tracts insufficiency of rain has so far retarded operations.

In the Omra districts (Khandeish, Berar, Central Provinces) rain was slow in coming, but sufficient rain has fallen now to allow ploughing to be started.

The Broach, Dhollerah and Muttiah countries have had fair rainfall, but except Muttiah these descriptions are late descriptions, and there is time for them anyhow.

We are, generally speaking, still in a very early stage of the monsoon, and in all those parts where deficiency has been reported we may easily have the regular supply within a short while.

*(Volkart Bros., Winterthur.)*

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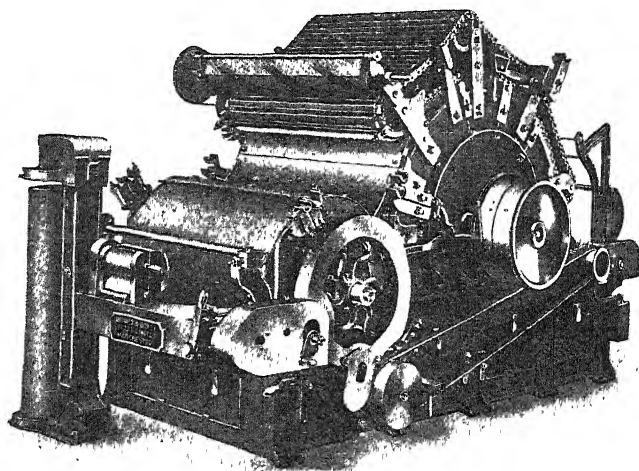
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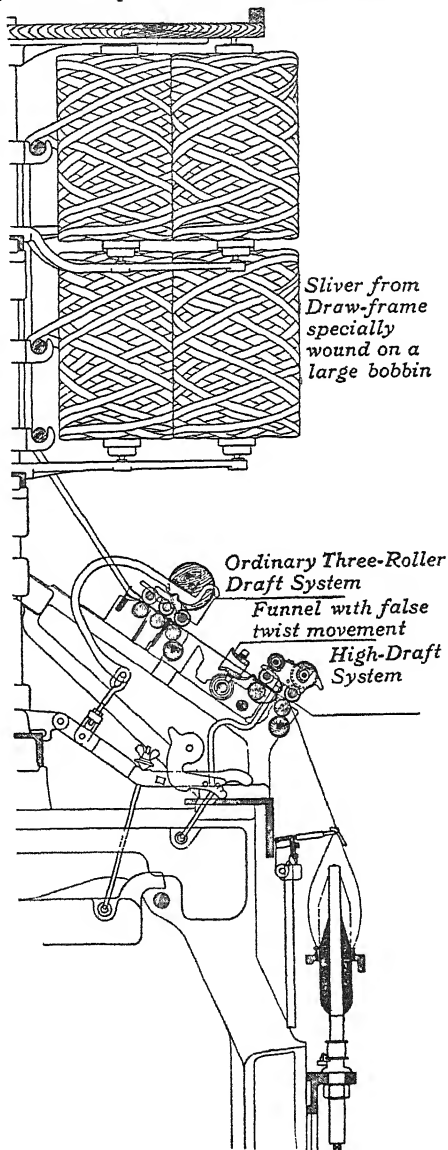
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## TECHNICAL SECTION.

### RING-SPINNING FRAME FOR HIGH COUNTS, WITH ELIMINATION OF ALL SLUBBER, INTERMEDIATE AND ROVING FRAMES.

About eight months ago the writer had an opportunity of seeing the first machine of the ring frame depicted below at the works of Hartman, Chemnitz, and was highly impressed with the yarn produced on it. At that time there were 14 experimental frames in German cotton-spinning mills, and evidently since then a larger number has been supplied. The reports published on the system by Professor Johannsen, who is the recognized cotton-spinning authority on the Continent of Europe, and by practical cotton spinners, speak very favourably of this combination, which allows drafts undreamt of formerly. The writer saw 70's being spun on a draft of 186. A German spinner, writing in the *Leipziger Monatschrift für Textil-Industrie* for April, 1929, who has used the system, speaks of the possibility of using a draft of 400, but, of course, as in any high-draft system, the extent of the draft will depend on the quality of cotton used. The same spinner states that the yarn has not suffered through the high draft in relation to strength and evenness. The writer can certainly confirm that the 70's yarn spun on the trial machine in the works was as perfect as any yarn could be, though the low-count yarn (24's) was not even. No doubt patience



and experience will be necessary to get the best out of the machine. The further development of this almost revolutionary invention in spinning rests undoubtedly with the spinning industry, and nobody claims that the machine in its present state is already perfect, though many practical spinners believe that it indicates the way of further developments in spinning.

The elimination of the slubber, intermediate and roving frames means, of course, an enormous saving in labour, power and space in the mill, consequently reducing considerably the cost of production. Scientific experiments have lately proved that a great deal of the unevenness of yarn is due to the slubber, and this has to be rectified by the intermediate and roving frames.

The arrangement of the machine is really simple, as will be seen from the accompanying sketch. The sliver is wound on a large bobbin, which, when spinning very high counts, may last a fortnight before it is renewed. From there it passes to any ordinary three-roller draft system, marked on the sketch "ordinary three-roller system"; it is then taken through a funnel to which a rotating hook is attached, which gives the sliver a false twist. The sliver receives the false twist in order to prevent floating fibres; this twist is taken out again as it comes to the high-draft system, and from there the cotton passes straight on to the spindle.

A special machine is needed for wrapping the sliver on the large bobbins, but this is a simple contrivance. It is somewhat similar to the machine used in woollen spinning, the sliver being rubbed together by leather cushions. This apparatus may be attached to the last draw frame.

A. S. P.

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## Spain's New Shuttleless Loom.

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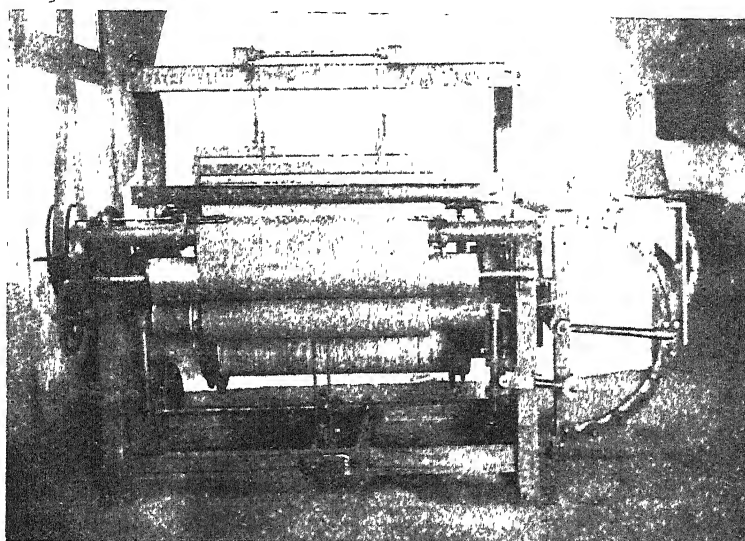
The writer was shown a few of these looms that have so far been made by *R. Garcia Moya S/L.*, 248, Diputacion, Barcelona. The loom has two, if not three, entirely new movements.

There is no shuttle, the thread is being taken across by a steel band (spring) which is running in the semi-circular sector on the right of the loom. The second new movement is a very ingenious stitch movement at the other end; when the weft thread is delivered to it the stitch comes into action and makes a perfect selvedge. The weft returns without the shed closing so that always two weft threads are in each pick. The loom makes 150 picks per minute, thus putting 300 weft threads in, which is said to be equal to 200 picks per minute with single thread in each pick. The cloth produced is very strong. Samples may be inspected at our office, 238, Royal Exchange.

Vibration is very little, it simply consists in the beating up of the weft. The looms were not even screwed to the floor.

The bigger the weft-cheese is, the less attention is required by the weaver. The inventor claims that this loom will do better work than the automatic loom and give a higher outturn, requiring less attention than the automatic loom. It is claimed to be suitable even for silk.

The writer saw one of these looms weaving two separate jute cloth at one and the same time. There were two sets of warps and two steel springs running over each other. In jute cloth, where weaving defects are not serious, the piece below the top piece may have a few faults.



The loom has also a novel positive automatic let-off motion of the warp.

One must admit that the loom seems simplicity itself. Experience will show whether the claims of the inventor will be justified.

This shuttleless loom will be exhibited at the International Exhibition in Barcelona and demonstrations will be given before the delegates of the International Cotton Congress on September 21st, 1929.

In France Ballber & Co., Tourcoing, are making the loom for woollen mills.

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## EFFECT OF TEMPERATURE AND HUMIDITY ON COTTON SPINNING.

---

Bulletin N. 19 (technological series 14) of the Indian Central Cotton Committee, Bombay, contains a description of the further tests undertaken by Mr. A. James Turner, Director of the Technological Laboratory. His conclusions are as follows:—

The results obtained in the present tests confirm and extend those obtained in the previous tests. By reproducing the relative humidity to below 30 per cent. a stage is reached when drawing cannot be carried out satisfactorily; moreover, yarn breakages on

the ring frame became more numerous at this low humidity, the effect being specially pronounced in the the higher counts, which also have lower strength when spun under very dry conditions. It is accordingly concluded that although for Indian cottons spun into counts not higher than 40's it is sufficient to keep the relative humidity rather above 30 per cent., yet, if higher counts were to be spun, bad spinning troubles would be still more in evidence and it would be desirable to work at a higher relative humidity, say at least 40 per cent., or even higher for very fine counts. The yarns spun under the various conditions of temperature and humidity, while very similar in evenness and neppiness, yet differ widely in their appearance, for the yarns spun under the hot-dry conditions are very oozy indeed, full of snarls, and exceedingly crimp; the yarns spun under medium-dry conditions suffer from the same defects to a lesser extent, whereas the yarns spun under normal and monsoon conditions are free from them. However, all these differences between the yarns almost entirely disappear when the yarns are conditioned by immersion in water.

---

### THE EFFECT OF USING EITHER ONE HEAD OR TWO HEADS OF DRAWING INSTEAD OF THREE IN THE SPINNING.

---

Mr. A. James Turner, M.A., B.Sc., Director of the Technological Laboratory, Matunga, Bombay, has made comparative tests in order to determine how far it is justified to pass the card sliver through two heads of drawing only, even for 40's counts, whereas three heads of drawing are commonly employed in the Indian mills (as well as in Lancashire but not in U.S.A.).

The experiments undertaken and the results arrived at are described in Bulletin N. 20 (technological series 15) issued by the Indian Central Cotton Committee, Bombay.

The author summarizes the conclusions as follows:—

From the various test-results it is clear that whether the card sliver is subjected to one, two or three heads of drawing, makes little difference to the number of yarn-breakages sustained in the ring frame, or to the various yarn properties, viz., evenness, neppiness, strength, and extension. It is true that the yarns for the two and three heads of drawing are slightly stronger than those for one head of drawing, but the difference is small, and as between the yarns for the two and three heads of drawing there is very little to choose. It follows, therefore, that the practice at the Technological Laboratory of using only two heads of drawing gives results similar to what might be expected from three heads of drawing. It has to be remembered, however, that the card sliver used for drawing in these tests is the production of a single card; if, as in mill practice, card slivers from a number of cards were to be fed to the first head of drawing, clearly the results would be affected by the extent of the differences between the different card slivers; this effect must obviously be allowed for when the results of the present tests are applied to mill practice.

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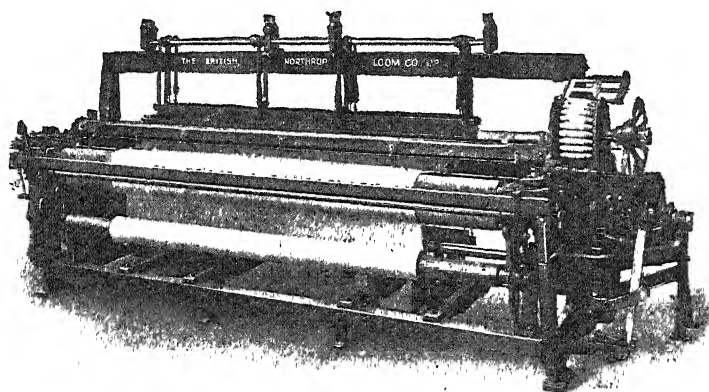
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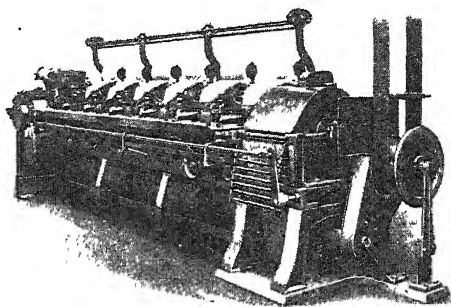
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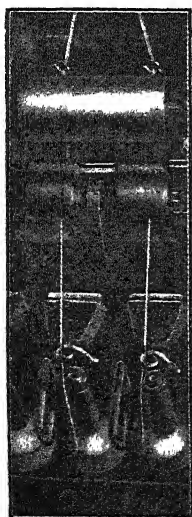


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## Cutting Out Waste.

---

*By C. W. BRETT (Managing Director, Barumar Ltd, Scientific Welding Engineers.)*

Someone has said that life nowadays consists of a series of problems, most of which appear to be insoluble. Now, while admitting that generalizations are dangerous, there is more than a modicum of truth in this pronouncement. Since the unforgettable year 1914 life in general has been both difficult and complex. We do not, and possibly cannot, spend as we used to do; we dare not take risks in business as we used to do in those far-off untroubled days. We hesitate to "chance our arm," or, if we do we are harassed by anxious thoughts, and spend many bad moments wondering if our projects and enterprises have been wisely undertaken. With the sweeping away of pre-war ideas our mental attitude and outlook has been entirely changed; we have had to readjust our mind to altered conditions, and adapt ourselves to a world which, in many respects, is not yet stabilized.

But in the chaos of uncertainty one fact stands out with vivid clearness: the supreme necessity of rigid economy in all directions and all departments of life. We realize now the full meaning of the economists' injunction: "Waste, whether of cash, effort or time, is the antithesis of success and prosperity." Unless we save we are, metaphorically, on the road to perdition, which, in business parlance, means bankruptcy.

Now, strangely enough, many who instantly and without hesitation subscribe to the truth of such dicta are—sometimes unconsciously—frequent transgressors when it comes to practical application. Numbers of astute and capable business men who would not tolerate the prodigal use of the paste-pot, and would lose more than a night's sleep if they suspected that the stamp book had been abused, or that the typist had spoiled two sheets of superfine headed paper, permit hundreds of pounds, at a modest estimate, to be thrown away in needless expenditure.

Admittedly it is difficult to detect financial leakage in a concern in which apparently every detail, method, process and department has been viewed and reviewed times without number, and every recognized opportunity for the practice of economy embraced.

The trouble is with many of us that we are so preoccupied with *direct* issues and our own immediate concerns that we fail to note contingent questions, and overlook those things which, as it were, lie behind our principal activities. In the textile world, for example, every stage in production has been carefully scrutinized with an eye to reducing costs, the purchase of raw material, and the innumerable charges incidental to marketing have been "cut beyond further trimming." What is often forgotten, however, is the efficient and economical maintenance and repair of the mechanical units used in the textile trade. So long as all goes well the subject is never discussed. When, however, fracture or wear and tear or other accidental damage causes breakdown and

departmental dislocation the procedure resorted to is to send for the makers of the inefficient machine.

Now the outstanding disadvantage of this method is that it involves the scrapping of units or components which, if scientifically treated, are 100 per cent. efficient.

To the layman the "snag" here is probably the interpretation of the words "scientifically treated." Here, then, is the precise translation: Scientific welding. Scientific welding completely fulfils every requirement in mechanical upkeep because: It can be instantly applied to the total or partial reconstruction of plant and machinery of all sizes, used for all purposes. It can be relied upon to effect a cash saving of from 50 per cent. to 90 per cent. on the estimate cost of replacement, and a proportionate saving in time. One or other of the half-dozen fusive processes now universally used by experts can be applied to the re-creation of each and all of the industrial metals, including the high-speed alloy steels which are now so largely used in the construction of all sorts of mechanical devices. Lastly, it is not merely of value in restoring a machine or part to its original condition, but may be employed to increase strength and dimensions to any given extent, and to overcome weaknesses due to faulty design or inferior material.

At this juncture, as there appears to be some misapprehension in certain quarters as to the value and efficacy of scientific welding, it may be well to refer briefly to the conditions under which high efficiency at low cost can be effected. The *one-process* operator, even though he be an expert, cannot be relied upon to deal with

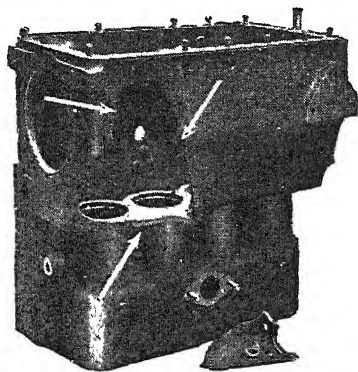


Figure 1.—A badly broken block of cylinders and crankcase combined, belonging to motor vehicle.

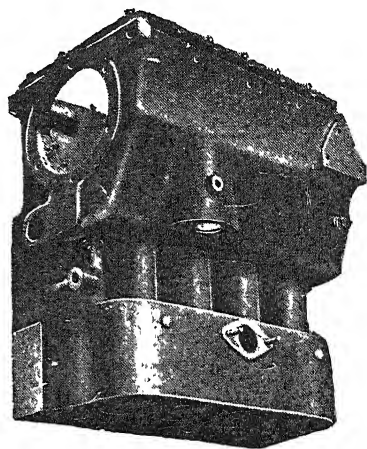


Figure 2.—The identical cylinders and crankcase combined, perfectly repaired by Scientific Welding, at small cost, within a few days, and under a Money-back Guarantee.

mechanical reconstructions to all classes and types of machinery, constructed of industrial metals of differing qualities and properties. Oxy-acetylene cannot take the place of the electric arc, and vice versa, and so on with all the fusive processes. Each has its special advantages and drawbacks in any given case, and it is only by

expert knowledge of all the fusive agents that success may be attained.

Here, owing to a natural lack of technical knowledge, the machinery owner is at a distinct disadvantage. He cannot estimate the ability or experience of an operator, so that the only way in which he can protect himself from exploitation is by placing all mechanical and reconstruction work in the hands of a craftsman who is prepared to give a definite satisfaction or money-back guarantee. If this is not forthcoming it may be taken as evidence that the welder is either unsure of himself or doubtful as to the potentialities of the process he proposes to employ.

Actually the process of welding, though apparently simple, is attended by many dangers, and, in the hands of an incompetent operator, the vast probability is that the machine treated will be seriously damaged, if, indeed, it is not totally destroyed. The risks are enormously increased when the work involves the handling of modern alloy steels, containing vanadium, tungsten, nickel, chromium, zirconium, molybdenum, titanium, manganese, etc., any of which may be rapidly robbed of their special qualities when subjected to temperatures ranging between 1,200 and 5,500° F. without proper safeguards.

Another difficulty of which the machinery user should beware arises from the fact that it is practically impossible to distinguish between good and bad welds by external examination. This means that the unqualified operator can put up an excellent defence by placing the blame which properly attaches to himself upon inferior material. To guard against this the specialist has been forced to adopt searching laboratory and workshop tests calculated to determine the soundness or otherwise of the work. These include X-rays, radio-metallographs, and photo-micrography, followed by investigations in the testing bays. By these means some 30 or more serious faults are regularly revealed in the work of the incompetent welder—any one of which may readily cause a serious accident.

Clearly, therefore, if welding is to have any economic value in the repair and maintenance of machinery it must be employed by a craftsman whose credentials will bear the strictest investigation, and whose knowledge of the work is not confined to one process.

It has been suggested above that the scope and value of scientific welding is not limited to any type or size of machine or to any class of industrial metal; nevertheless, the following incomplete list of units used in the textile industry, whose partial or complete reconstruction is now regarded by the specialist as ordinary routine work, may be of interest to readers of the INTERNATIONAL COTTON BULLETIN: Furnaces, boilers (all types and sizes) mechanical stokers and fuel feeds, engine room fittings and appliances, power units (steam, oil, gas, petrol or electrically driven), cotton looms (all types), carding engines, strippers, doubling mills, combers, winders, reelers, gassing frames, openers (all kinds), scutchers, carding machines, gins (all types), cleaners, conditioning ovens, blowers, fans, pumps, exhausters, mules, lappers, polishers, bundlers, lifts, hoists, elevators, conveyors, runways, etc.; all metal parts of all mechanical transport units, including the repair of fractured,

damaged, worn, scored, or cracked cylinders, crankcases, crankshafts, camshafts, gear boxes, gears, axle boxes, axles, transmission shafts, hubs, wheels, radiators, mudguards, lamps, and all garage tools and accessories.

While the widest possible claims may justifiably be made on behalf of welding as the ideal method of maintaining plant and

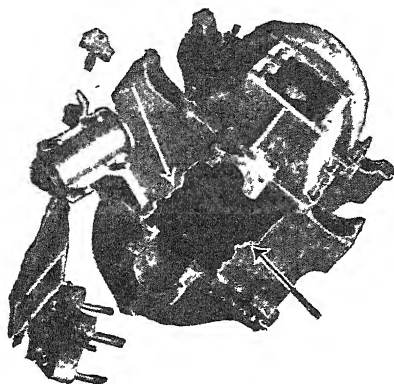


Figure 3.—A valuable aluminium gearbox, belonging to another vehicle. The extent of the damage is clearly shown.

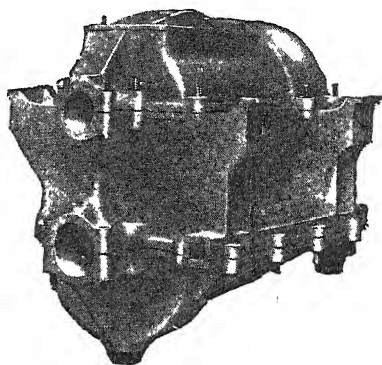


Figure 4.—This shows the aluminium gearbox after repair by Scientific Welding. This repair cost a mere fraction of the price of a new part, and was fully guaranteed.

machinery at the maximum efficiency level with minimum cost and minimum loss of time, it must be remembered that neither economy nor efficiency can be well served unless the work is executed by an operator whose knowledge of metallurgy and thermics is absolutely beyond debate, and whose experience in dealing with modern industrial metals enables him to select unerringly the fusive process from which the best results may confidently be anticipated.

"If," as a well-known engineer said recently, "welding fails blame the operator, never the process." And this statement may well be taken to heart by all machinery owners, and those responsible for the upkeep of plant and mechanical devices of every description. Anyone can do the work; but to do it as it should be done is a job for the accredited expert.

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### THE IMPROVED "SEGUNDO" COTTON-SEED DEFIBRATING MACHINE.

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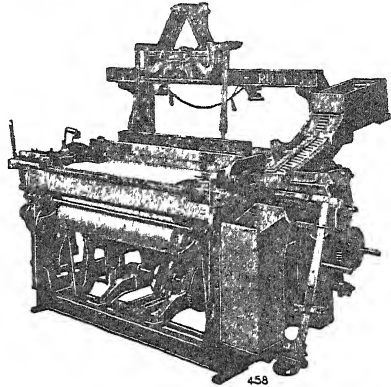
In a recent issue we referred to important improvements made in the "Segundo" cotton-seed defibrating machine whereby the output has been increased between four and five times without increasing the size or the cost of the machine.

We now learn that the improved machine has recently been thoroughly tested out at one of the mills belonging to the British Oil & Cake Mills Ltd., and that this Company has decided to erect a plant capable of defibrating the whole of the cotton-seed crushed at this mill (about 200 tons per week) after linting the seed in their saw-linting plant.

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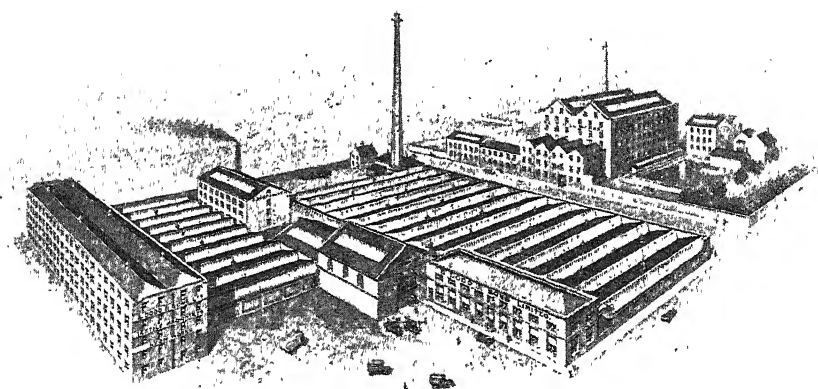
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We have already pointed out that this machine does not compete with the saw-linter in removing the higher grades of linters—up to, say, a  $2\frac{1}{2}$  per cent. or 3 per cent. cut—but these trials have shown that the cost of removing the remaining fibres is very considerably less, per ton of seed, by defibration in the “Segundo” machine, than by a second cut in the saw-linter, on account of the absence of saws (thus eliminating one of the largest items of expense in the saw-linter), the extreme simplicity of construction, the cheapness and ease of renewal of the defibrating surfaces, the low consumption of power, and the small amount of labour and supervision required. Moreover, the machine has proved itself capable of carrying the defibration of the seed much further than is practicable with the saw-linting machine.

For purposes of comparison with the performance of the saw-linting machine, we give the results of one of the trials. East African seed (which is similar to the American Upland cotton-seed, but does not contain so much lint) was linted as closely as practicable in the saw-linting plant at this mill, about  $6\frac{1}{2}$  per cent. of linters being removed. This closely linted seed was sent through the “Segundo” machine at the rate of 750 lbs. per hour, and a further 16 lbs. of fibre per hour, or 2.13 per cent. of fibre was removed, leaving the seed almost black. The power consumed in so doing was  $16\frac{1}{2}$  kw.-hours, or about 22 h.p.-hours, per ton of seed.

The “Segundo” machine is vertical, about 8 ft. 6 in. in height, is belt-driven, and occupies a floor space (including that required for the belt drive) of 2 ft. 6 in.  $\times$  10 ft.

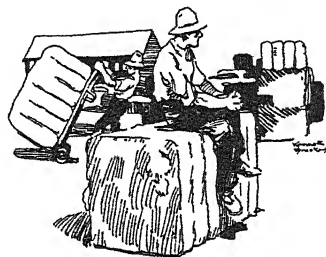
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### BARBER-COLMAN AUTOMATIC SPOOLER AND HIGH-SPEED WARPERS.

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It seems that quite unintentionally the report which we published in No. 25 of THE INTERNATIONAL COTTON BULLETIN on the mill visits of U.S.A. have conveyed the idea to some people that this machine is not in extensive use in U.S.A. It was not intended to convey this, and we gladly state that in U.S.A. 349 spoolers and 283 high-speed warpers are actually installed, and the yearly output is constantly increasing, according to this firm's statement.

The remarks in our report were “that the ‘Leesona’ system predominates”; this could apply only to the mills visited and described, and their number represents, of course, a very small section of the industry as a whole.



**JUST ISSUED.**

THE  
**Cotton Spinners' & Manufacturers'**  
**Directory for Lancashire.**  
 45th EDITION  
 1929.

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## The Era of Combination in the Lancashire Cotton Industry.

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After many years of talking, by means of which no doubt a great deal of necessary spade work was achieved, Lancashire finds herself almost suddenly in the midst of the practical work of amalgamation and combination for the purpose of reducing overhead expenses and modernizing the technical as well as the commercial part of the industry.

The principal combination which has come into existence is that of the *Lancashire Cotton Corporation Ltd.*, an organization which evidently enjoys the support of several banking institutions. The arrangements for the absorption of a large number of individual companies is proceeding at a fast rate. So far 80 mills have been inspected and firm offers have been made for 71 companies comprising 10,194,347 spindles and 5,719 looms. Five of the mills inspected by the experts of the Lancashire Cotton Corporation have been refused, as they would represent uneconomic units impossible to work on efficient lines. The policy of some banks evidently is that where the board of directors and shareholders refuse to join the new organization a receiver is put in charge and the company is threatened with liquidation. That, of course, as examples have shown recently, leads to a much smaller return to the creditors than what the Corporation is willing to pay, and generally the shareholders decide after more mature consideration to accept the offer of the Corporation.

The experts of the Lancashire Cotton Corporation are very particular in the valuation of the concerns that are being absorbed and are only paying the fair market value. In order to show more or less the manner in which the creditors are treated, we give the following particulars of one transaction:—

“An offer from the Lancashire Cotton Corporation for the purchase of the assets and undertaking of the Saxon Mill (1919), Ltd., Droylsden, Manchester, with 89,304 mule spindles (Platt's) has been received by the directors, and it will be considered at a meeting in Manchester on July 8.

“The assets have been valued at £129,966, and the purchase consideration offered is £61,983 in income debenture stock, £3,000

in cash, £60,582 in ordinary shares and £3,029 in deferred shares, with a further £1,372 in deferred shares to be allotted in consideration of the amounts paid on calls.

"The debenture holders will get 20s. in the £ on debenture stock, shares and cash, the unsecured creditors 9s. 7d. in the £ in shares and cash, and the shareholders approximately 71 1s. deferred shares for each 100 shares now held, with a further 20 shares, making 91 shares in all when the remaining capital has been paid up."

It is anticipated that the Lancashire Cotton Corporation will eventually have more than 10 million spinning spindles and 30,000 looms, and thus the organization will be the largest of any cotton mill combine in the world. Needless to add, it is contemplated establishing a system of direct purchase of cotton and of direct sales of cotton yarns and goods. Mills will be modernized and as far as possible the mass-production system will be introduced.

Another amalgamation is that to be known under the title of *Combined Egyptian Mills Ltd.*, with a nominal capital of £3,500,000. Good progress is being made with the various formalities, and the Manchester Chancery Court has already sanctioned the amalgamation of the following mills:—

	Spindles	
	mule	ring
Laburnum Spinning Co. (1920) ...	343,152	5,616
Mather Lane Spinning Co. (1920) ..	227,000	
Gorse Mill (1920) ... ..	100,224	
Sparth Mills (1919) ... ..	115,864	11,476
Cowling Spinning Co. (1920) ...	120,000	25,000
Sir John Holden & Sons ... ..	125,000	31,000
Alder Spinning Co. (1920) ...	123,312	
Bedford & Mill Lane Spinning Co. ...	168,960	7,200
	<u>1,323,512</u>	<u>80,292</u>

Other mills are sure to join and it is anticipated that this organization will comprise  $3\frac{1}{2}$  million spindles

The third amalgamation is that of the *quilt makers*, with a capital of  $1\frac{1}{2}$  million pounds sterling, comprising the following companies:—

Jonathan Dearden & Co. Ltd. (incorporating James Lomax Ltd.).  
 T. Taylor Ltd.  
 James Kippax & Son Ltd.  
 John Phethean & Co. Ltd.  
 Henry Bond & Co. Ltd.  
 Eccles Quilts Ltd.

Other combinations are in the course of preparation.

This amalgamation movement is bound to have a beneficial effect, not only in the saving of the cost of production but particularly in preventing undercutting of prices by financially weak concerns which, as experience has shown during the last few years, have been forced to accept prices which are entirely uneconomic, and in this way not only Lancashire but the whole of the cotton industry of the world will benefit by this movement.

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## WAGES REDUCTION IN LANCASHIRE COTTON INDUSTRY.

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The preceding article on the amalgamation of cotton mills shows that strenuous efforts are being made in Lancashire to achieve savings in the production and in overhead charges. It has taken years to arrive at the present stage, before directors and shareholders of mills were ready to recognize the necessity for such combinations, and it will yet take a long time before the industry as a whole has been modernized technically and commercially.

With the reduction in the cost of living in England to the index figure of 60, and a wage of the cotton-mill operatives of 95 per cent. above pre-war level, it was only natural that the leaders of the industry, amongst the various means of economizing in the cost of production, considered the time for a reduction in the wages as overdue, and consequently on June 21 the two large organizations—the Federation of Master Cotton Spinners' Associations and the Lancashire Cotton Spinners and Manufacturers' Association—decided that their members should give notice to their workpeople that from August 3, 1929, a reduction in the wages of about 12½ per cent. would take effect.

The operatives' unions oppose, of course, this demand for a reduction on the plea of reduced earnings owing to short time, and that first of all the mills should put their organization in order before attacking wages. They do not realize as yet that the latter work takes years to accomplish, and if meanwhile the wages are to remain unaltered there will be very little business left for Lancashire. The very large quantity of looms and spindles which during the last few years have gone out of existence and have consequently meant unemployment and displacement of labour are evidently not yet sufficiently drastic signs to the operatives.

During July negotiations with the trade union leaders are taking place and it is hoped that a settlement will be arrived at.

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## COTTON FACTORY IN BOLIVIA.

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A factory containing 200 looms for making grey sheetings, drills, gingham and trouserings is being completed. The cotton will be imported from U.S.A. via Arica, transport expenses being the same as from New Orleans to Liverpool.

The new industry is to be assisted by the Government by free importation of raw material for four years, or until such time as raw material should be available in the republic, by the increase of import duties on the articles of the kind imported from abroad, and certain other advantages to be enjoyed by the concessionaries.

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## Automatic Looms—

### Opinions of English Cotton Manufacturers.

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In conjunction with a visit paid by a number of cotton manufacturers of Lancashire to the British Northrop Loom Works at Blackburn an opportunity was given to exchange the views on automatic looms by several Lancashire cotton manufacturers who have used the Northrop loom for some considerable time. The *Textile Weekly*, Manchester, gives a full account of the visit to the works and of the proceedings which took place later on.

As the question of automatic looms is engaging the attention of many manufacturers in different countries we extract from the above-mentioned report the following:—

An unrehearsed incident during an inspection of the British Northrop Loom Co.'s works; at Blackburn, by cotton trade leaders on Thursday of last week, revealed the important fact (often the subject of many an animated debate) that automatic weaving can be efficiently carried out at the rate of 220 picks per minute. The incident occurred in the showroom, where there are many different types of looms running, and which will be referred to later.

The visitors showed a keen interest in a single-shuttle loom weaving a 40-in. Burnley printer. It is well known that of all the sections of the Lancashire cotton industry which have suffered the most severely from foreign competition, it is this particular section. The visitors asked for all the looms to be stopped with the exception of this particular loom, and that it might be speeded up to see what it could do. The original speed was 190 picks per minute, and it was speeded up to 220. It ran for about 10 minutes perfectly satisfactorily, transferring the bobbin without any sign of strain or undue wear and tear. This particular loom is ten years old, and is the firm's standard mass production model.

The visitors went over the whole works; moulding and erecting shops; shuttle and bobbin making departments; but the longest time was spent in the showroom, where the whole of the looms were set in motion. They wandered around at will, as the interests of the visitors were many and varied. A special feature noted throughout the works is that automatic machinery is employed wherever possible in the making of automatic looms. It is the practice of the firm to introduce machinery which in any way saves human effort. The conditions under which the operatives work were referred to in complimentary terms by a few of the speakers at a subsequent luncheon. The operatives not only share the firm's prosperity but also their goodwill, and are determined to help rather than hinder in this particular section of industry.

The showroom demonstrated the capabilities of the various types of looms. One was weaving fine worsted, another wool, others silk and rayon with an intricate jacquard pattern; two were fitted with fully-automatic terry towelling motions, which inserted auto-

matically fringes, headings, and coloured borders, and in addition record the number of towels on an indicator placed at the top of the loom. The firm also makes all weights of looms from 24 ins. to 150 ins. reed-space for cloths with one to four colours or kinds of weft. There are also special looms for extra-heavy weight cotton canvas and duck cloth, also for elastic webbing, check cloths, etc.

The slump in the textile trades of this country has provoked a great deal of discussion regarding the place of the automatic loom in the industry. So far the British industry has not taken very kindly to it; America and other countries, particularly Continental, have built their textile industries upon it. America alone has over half a million Northrops, and there are over 600,000 installed throughout the world.

Much of this discussion regarding automatic looms has centred round the question of the number of looms a weaver can attend. With properly prepared weft, that is, either re-wound or spun direct on to Northrop pirns on the ring-frame, the possibilities are practically unlimited. The tendency, to-day, throughout the world is to increase the number of looms per operative. In this country the number of automatic looms to a weaver is restricted by trades union policy to 20 or 24. In Europe there are numbers of Northrop installations in such countries as Germany, Holland, Belgium, France and Italy, all competitors of Lancashire, where the weaver minds 32, 36, and even 40 looms. This, of course, involves the organization necessary for automatic weaving, which includes the additional help of battery fillers, one girl to about 48 looms.

The number of looms per weaver really should only depend on the number of looms an operative can start up in a day after yarn breakages. It has been found from experience that a weaver can mend broken threads and start up looms at the rate of about 220 to 240 per day of eight hours. In America, the average number of stoppages per loom per day has been reduced by scientific means to only five, so that an operative in that country can easily attend to 48 looms. Actually there are many sheds of Northrop looms in the States where one weaver minds up to 72 looms, and there are exceptional cases of over 100 looms per weaver. One firm has determined to achieve, by the scientific adoption of automatic machinery in every process, the amazing result of 150 looms per weaver, before the end of this year.

There is now a strong current of opinion in this country that the only salvation for the industry is mass production, but it is questionable whether we have any real conception of mass production when carried out to its utmost limit. This, of course, means automatic machinery at every stage, involving one or other of the high-speed winding and warping systems. In fact, processes and mill practice generally would have to be reorganized before mass production could be realized in the full meaning of the term. That is the position Lancashire is faced with to-day. The rest of the world appears to have already learned from Lancashire's deep-rooted system, and adopted different methods.

A great deal of the antipathy to automatic weaving in this country has arisen from a mistaken idea that the looms would not weave the particular types of cloth required. Nowhere in the world

is such a wide variety of cloth woven as in Lancashire, but the variety of automatic looms made is much greater than is generally realized. For instance, the Draper Corporation of America make a strong point of the fact that they have such an enormous plant that it is capable of turning out no less than 600 Northrop looms per week, an average of one every five minutes. It may seem strange, but it is nevertheless true, that the British makers of Northrop looms have had to depend largely on the foreigner for their development, including variety. They claim that they produce the largest variety of automatic looms in the world. The firm already exports over 50 looms per week, mostly to Lancashire competitors abroad, and is steadily increasing.

After the inspection, Mr. M. P. Gregg (director) welcomed the visitors and he called upon Mr. Arno S. Pearse to tell them something of his experiences during his recent travels.

Mr. ARNO S. PEARSE, the General Secretary of the International Cotton Spinners' and Manufacturers' Associations, expressed his pleasure at the opportunity of going through the works to see so much automatic machinery making automatic looms. It had vividly recalled to him his experience of visiting the Draper Loom Works and others in America, Switzerland and Japan. He was particularly struck with the very capable workmanship shown, and never had he seen workmen work faster than that day. The Northrop Company were to be congratulated on the fine modern plant and organization for turning out looms.

As they perhaps knew, he was a great advocate of automatic looms. Mr. F. Helm and he were in the States last year, and visited some 30 mills and since then he had been to Japan. They had in the latter country their own automatic loom which they claimed to be of great advantage, making 210 picks per minute under mill conditions. There were many makes of automatic looms in the world, and it was for the individual cotton manufacturer to find out which suited his own requirements the best. The variety of cloths he had seen on the Northrop looms in the United States was a very large one, and he could say that although the Northrop had certainly been the pioneer it had not remained at a standstill, but had kept pace with new improvements.

Mass production to his mind was essential to-day, and the Northrop loom as well as any other reputed automatic loom was the means by which that mass production could be achieved.

He was an advocate of ring yarn; the ring frame was the corresponding machine in the spinning department to the automatic loom in the weaving department. Ring yarns, he was told by many people in Lancashire, were no use, that they could not produce as soft a ring yarn as mule yarn. He had travelled in the United States, Japan, China, and the Continent of Europe, where they spin mostly ring yarn, and everywhere the spinners had told him that they do produce a ring yarn soft enough to take the place of mule yarn.

There had been a strong aversion to the automatic loom in England, but it seems that at long last Lancashire is beginning to realize the value of the automatic loom. Mr. Pearse said: "To

one who is frequently travelling in foreign countries and has seen that U.S.A. have about 400,000 automatic looms, and the Continent of Europe perhaps another 100,000, it has often seemed that England thinks she is the only country which is right and all the others are wrong. 'Our Tommy is the only one in step.'"

A similar antipathy exists against ring yarn. Ring yarns were the fundamental requirement for the good working of any loom with a warp-stop motion, and consequently also for automatic looms. So far no efficient warp-stop motion for mule yarns seemed to have been invented. In Japan he had seen as many as ten ordinary looms with warp-stop motions to a weaver, and six such looms to a girl is quite the ordinary thing. Surely if Japanese female operatives of 14 to 18 years of age could look after ten looms, they did not mean to say that a Lancashire operative was not capable of doing the same, or even more! He thought the Lancashire operatives were superior to those of any nation, but unfortunately they were not given a proper chance owing to old-fashioned trade union restrictions. In his opinion the mill owners should endeavour to persuade the union leaders to alter their views and make them coincide with the advancement of modern machinery necessitating less labour. New labour-saving machinery was very expensive, costing four and five times as much as the old-fashioned machinery; consequently depreciation and interest charges were much higher, but as they did save arduous labour the unions should recognize this fact, and abolish restrictions that might have been good for old machines but are quite out-of-date with the new ones.

In other countries that opposition has never existed, and consequently the automatic loom has developed there to the detriment of Lancashire. In foreign countries they were more easily able to buy these high-priced looms because they could run them longer hours than in England, or even during a second shift. The installing of such new machinery pays the mill only if the machine could be worked more than 48 hours per week. During the second shift the machine earns the high outlay for social legislation, taxation, etc., and as there are constant improvements coming out a high-class labour-saving loom would be superseded in ten years, and it was only if one could work the loom longer than 48 hours that sufficient depreciation could be provided for in order to allow for its replacement after ten years by a still more perfect machine. Lancashire would be more and more losing its trade, unless means were found of replacing old looms by automatic looms.

Mr. G. W. RICHARDSON, President of the National Federation of Textile Works Managers' Associations, said in his case he was a convinced believer in the automatic loom. He had said on more than one occasion that the only fault with the Northrop automatic loom was the cost. He believed in up-to-date machinery and mass production, but he asked why they could not bring their prices more in conformity with the ordinary Lancashire loom. He had Northrops from 34 inches up to 90 inches, and in 1916 he turned out 166 plain Lancashire looms and put 220 Northrops in their places. The success of the Northrop loom was to catch the operatives young, for the reason that they gave more attention to detail than they could get from the older employees. At the end of each school-leaving period, he took six to eight girls, and he was never

short of operatives. He first of all put them on small jobs like bobbin cleaning and battery filling, then gave them five looms, graduating to ten, fifteen, and so on until they became proficient. The same applied to overlookers and tacklers, and he had three young men learning at the present time. He found the Northrop loom was most successful when weaving coarse counts, owing to the stiff percentage additions on the ordinary Lancashire loom list for coarse counts. For example, he was weaving a cloth for which the weaver was paid 5s. 2½d. per piece against the Lancashire loom price of 12s. 0½d. per piece, but where the Lancashire loom weaver only attended two looms the Northrop loom weaver attended eight of the same width.

There were extra costs such as cleaning, battery filling and weft carrying. It was well known he worked for the C.W.S., and some people thought that when he wanted an order all he had to do was to go to their own departments and get an order at his own price. He could assure them that was not the case. He had outside competition to meet, and if he could not compete he did not get the order. With regard to Mr. Pearse's statement that Japanese weavers attended ten ordinary looms, he had tried an experiment by putting warp-stop motions on and the weft carried, the cloth taken away and the looms swept. One weaver attended six check looms (four 52-in. r.s. and two 36-in. r.s.) and increased her earnings by 2s. per loom per week more than a three-loom weaver. That showed they could increase production in that way. He thought the prominent union officials were coming to the conclusion that there would have to be some alteration in the direction of double shifts and a reduction in the price. Mr. Pearse mentioned the large varieties of cloth woven in America; there are quite as many varieties made here, if not more. He was making cloths using weft from 5's condensor to 120's combed Egyptian.

Mr. T. ASHURST, Secretary of the Cotton Spinners' and Manufacturers' Association, referred to the huge amount of detail Mr. Pearse had managed to get into his reports. The question of two shifts was one which had always been in front of their minds when they had been discussing the subject of automatic looms. When automatic looms were used in Lancashire, more than 48 hours a week would have to be worked or they could not carry on. The cost of installation was so high that if they could run double shifts instead of one, then it was a feasible proposition. Only within the last 14 days an attempt had been made to run two shifts and the operatives' representatives had said they were against any such system. In one case, they were rewinding part of their weft and it was impossible to keep their looms running unless they continued the two-shift system.

He thought that was one of the ways in which they ought to try to solve the difficulties of installing of automatic looms. As to the excessive cost on the industry generally, since 1919, when the hours were reduced from 55½ a week to 48 hours a week, it was impossible to support an increasing population with increased overhead charges, less output and less working hours. We should have to get back to the two-shift system, and he thought with the goodwill of the operatives we could do it. He felt sure that some of the operatives' leaders were convinced the two-shift system

would have to come. They had to face the fact that the dearest portion of their production costs were the prices they had to pay for the human factor. That must be got down, otherwise they would not be able to compete with manufacturers abroad.

Referring again to Mr. Pearse's reports of America, Japan and China, Mr. Ashurst said he had been struck with the information regarding the number of workpeople in comparison with the number of machines installed. Lancashire would not be able to regain its trade unless it got down to some such system—either a longer week or two shifts to the installation of automatic machinery. Running longer hours than we did at present in the long run would not displace workpeople. If they did that they would be able to see some return for their outlay. They did not forget they had to meet their indebtedness incurred during the war years. We had had to face more taxation than any other country; social services, taxation, both local and imperial, and all those charges added to their overhead costs.

They had learned something from their visit, and that was, how much better they would be if they turned their attention to mass production—not only mass production and leave it at that, but they ought to keep their finger on the commodity until it eventually arrived at the door of the customer. The selling end seemed to think more in terms of £ s. d. instead of turnover, which may be all right from the national standpoint, but from the standpoint of the Lancashire worker it should be Y.D.S. every time. If they kept that object in view, they would see the dawn of a better day.

Mr. F. ARROWSMITH congratulated the firm on the progress they were making. His own firm had had over 1,000 Northrop looms for a number of years, and the number had been increased to 1,350. Experience had led him to the conclusion that the importance of the automatic loom was not so much a matter of the number of looms to a weaver as on the production per loom, and they had 24 looms per operative. Mr. Pearse had mentioned the matter of bobbin weft and mule weft, and he could say that for 21 years they had been spinning ring yarn on pirns which went direct to the shuttle. There were 24 looms to a weaver, with an average efficiency of 92 per cent, and they left the looms running during meal hours.

Referring to the general position of the industry, Mr. Arrow-smith said they, as a trade, could not take more out of it than they put into it, and in his opinion it meant a reduction all round. The Lancashire trade union leaders were a well-balanced body of men, and they ought to get the employers together.

Mr. WILLIAM WILKINSON, Principal of the Blackburn College of Technology, said as one who was particularly interested in weaving machinery it had been a pleasure to again see the Northrop loom works. Every time he visited the works the motto "progress" had been more and more impressed on his mind. In regard to the former opposition to the automatic loom, Mr. Wilkinson said that the pendulum was swinging in the other direction. In regard to automatic weaving machinery, one of the first essentials they ought to consider when they decided to adopt machinery of this type was the principle involved.

After many years' experience in the industry, he had recognized

the fact that the success of any loom, whether automatic or ordinary, was the traverse of the shuttle. If it was not properly housed and boxed and sent from side to side in the correct manner, the efficiency of the loom was considerably reduced. These were features of the Northrop loom. The four-box motion was a really wonderful achievement in regard to loom making.

Mr. ERNEST SMITH, Secretary, Burnley Master Cotton Spinners and Manufacturers' Association, said they had certainly got mass production in the works. It was remarkable to see the way in which every person was working. The whole thing was an eye-opener to him. They had an extraordinarily good system of getting value out of the workpeople. For the past six or eight months his Association had been going into the question of reducing costs, and he could not understand why they had not been to look round the Northrop loom works. They had been to various places, but somehow they had missed Blackburn. He suggested that they might bring their special committee. Mr. Pearse had mentioned that in Japan they had more looms to a weaver than in this country. By agreement with the operatives' Association they were trying eight looms to a weaver. At the present time they had not got warp-stop motions. Something had to be done. In Burnley they had 20,000 looms out of commission.

Mr. T. DUXBURY, Manager of Messrs. Barlow & Jones, Bolton, said he was connected with a firm which had been using Northrop's for 20 years. He had followed the development of the loom right from the beginning, and it had grown from what might be termed a mass of metal to a perfect machine. There was a vast difference in the present loom and when it was originally introduced. They had adopted this class of loom to different types of work, both fine and coarse. The Northrop Loom Company had always been willing to assist them in any way they could with new introductions, and that service had been to their mutual benefit.

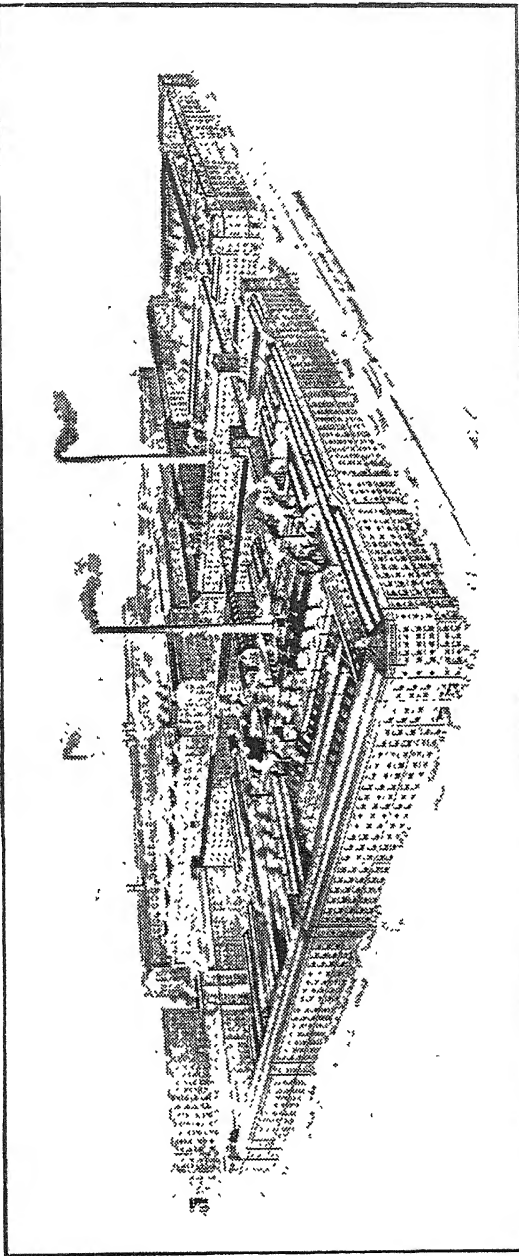
Mr. C. TATE, Secretary of the Blackburn Cotton Employers' Association, said he had been charmed with his visit. In the introduction of new machinery they were not able to get recognition from the operatives without a stiff fight. For the past three years they had been negotiating for a reduction of weavers' wages for re-wound weft. The operatives had made an examination, and they had agreed that it would be of benefit to the workpeople. It would mean an increase in their earning capacity of about 10 per cent. with less work. In the "Uniform List of Prices for Weaving," the pay was based on the particular cloth which was made; with an automatically woven cloth it was based on the pick. When they got the basis on the pick for dobbies and jacquards as on plain cloth they would be more able to compete with Continental countries, where they had the pick basis.

Mr. M. P. GREGG, replying for the firm, dealt with the questions of price, double shifts and automatic machinery generally. Price, he said, was not the most important thing; they were not always working for money. Price applied to the operatives. What they wanted to do in the progress of civilization was to take labour away from the operatives and put it on the machine. One of their axioms was: "If there are faults in the weaving it is the fault of

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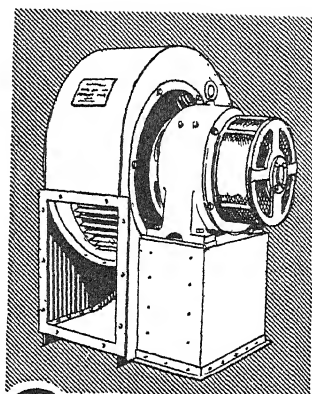
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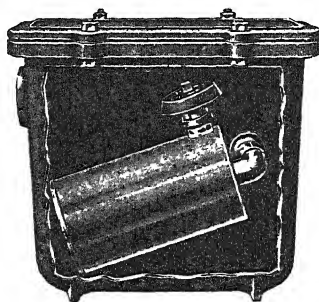
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the loom, and not of the operatives; if it is the fault of the machine it is our job to make the machine do its proper work." In regard to the capital outlay, Mr. Gregg said that wherever they got failures it was because the machine was not run properly. They had never yet had a failure where they had not had an equivalent success owing to the correct functioning of the machine. He agreed that with ordinary looms two shifts were impossible. With automatic looms two shifts was the secret of the position. It was because the looms on the Continent were working for 16 out of the 24 hours that Lancashire was losing so much to-day. He advocated automatic machinery in general, and mentioned the Barber & Colman high-speed spooling and warping machines. It was a sad fact that there was not one installation in this country, but there were many in America. Lancashire condemned it because it did not suit Lancashire conditions. They wished it would be adopted because it suited their looms.

Because a machine was automatic it was not necessarily made any more complicated. The idea of automatic machinery was that it was labour-saving. There must be less work with automatic machinery; if they entailed more it was no good. They had many patents submitted to them, but if they did not save labour they were rejected. In making their looms they put on motions which saved labour.

In order to show the diversity of the cloths made on automatic looms on the Continent and the conditions under which they are produced we obtained from the British Northrop Loom Co. a few details.—INTERNATIONAL COTTON BULLETIN NO. 25 contains a similar list of cloths made in U.S.A. The firm states that the following are typical examples of automatic sheds on the Continent. The loom speeds vary from 170 to 190 for the narrow looms, down to 135 for the 90-in. sheeting looms.

#### NORTHROP AUTOMATIC LOOM INSTALLATIONS.

##### FRANCE.

The number of looms: 252 single-shuttle, light-weight, 40 in. and 54 in. wide; weaving sateens, twills and drills; 24 looms per weaver, 84 looms per overlooker. Efficiency 90 per cent.

192 40 in. and 60 in. looms, light-weight, with dobbies; 16 looms per weaver, 96 per overlooker; weaving striped shirtings, etc., 32's to 40's weft and warp, 60 to 80 picks and ends.

144 40 in. light-weight looms; weaving five-shaft sateens; 24 looms per weaver, 72 looms per overlooker; counts 36's, 38's weft, warp 32's to 36's, 50/60 picks and ends per inch.

144 Northrop fustian looms, with eight shafts, outside cam-plates; 32 looms per weaver, 72 looms per overlooker; ring-spun weft, 200/240 picks per inch, 18/30's weft, 45 ends, two fold 14's warp. One battery filler to 32 looms.

288 42 in. light-weight looms, plain and dobbies; weaving shirtings with figured art silk stripe; 16 looms per weaver, 72 looms per overlooker; counts 38/46's. 88 per cent. efficiency.

##### BELGIUM.

480 36 in. size light-weight looms, plain and five-shaft, weaving plains, calicoes, drills, twills, etc.; 22/36's weft and warp; 32 looms

per weaver, 96 looms per overlooker; battery filler for 48 looms. Efficiency 98 per cent. (Looms run during meal hours and double shift.)

64 80 and 90 in. Northrop sheeting looms, 12 looms per weaver; 16/28's warp and weft, 50/60 picks and ends. All the weft in the above mill is ring spun and they work double shifts.

104 42 in. and 56 in. size medium-weight looms, five-shaft and outside camplates, weaving plains, drills, velveteens, fustians, etc.; 32 looms per weaver; ring-spun weft.

Cloths of 24/30's warp, 70/80 ends, 12/16's weft, 44/50 picks.

Two-fold 12's warp, 40 ends, 12's weft, 200/220 picks.

### HOLLAND.

120 40 in., 48 in. and 54 in. light-weight looms, 24 looms per weaver, 120 looms per overlooker; plains and twills, 50/80 picks per inch, 30/60's weft, 70/80 ends, 24/36's warp. All re-wound weft, and weavers fill their own batteries.

280 40 in. and 60 in. light-weight looms, 36 looms per weaver, 90 looms per overlooker; 32's weft, 68/70 picks, 24/36's warp, 60/70 ends.

172 40 in. Northrop fustian looms, eight shafts, outside camplates treading; 36 looms per weaver; cop weft; one battery filler for 36 looms for skewering cops; 12's weft, 200/220 picks per inch; two-fold 24's warp, 30 ends per inch. 95 per cent. efficiency. Looms run during dinner hour and two shifts.

120 40 in. and 90 in. looms; 32 and 12 looms per weaver filling their own batteries; cloths—fine plains, shirtings and drills, 60/80 picks, 36's weft, 60/80 ends, 24/36's warp and 56/66 picks, 16/24's warp, 50/60 ends, 16/24's weft.

### GERMANY.

212 42 in. light-weight looms; 24 looms per weaver; filling their own batteries; cloths—55/65 picks and ends, 24/36's counts.

120 36 in. light-weight looms; 16 looms per weaver, 80 looms per overlooker; plain and five-shaft fine goods; 46's and 62's weft and warp, 72/100 picks and ends.

### SCANDINAVIA.

800 32 in. light-weight looms, 20 looms per weaver, 100 looms per overlooker; plains, twills and drills; 16/18's counts, 44/88 picks and ends.

300 36 in. light-weight looms weaving heavy plains, 12/16's counts, 16 looms per weaver.

### ITALY.

100 44 in. medium-weight looms with dobbies; fancy shirtings, etc.; 24/30's warp, 70/100 ends, 12/16's weft, 44/50 picks; 16 looms per weaver, 80 looms per overlooker; re-wound weft.

350 32 in. and 56 in. size medium heavy-weight looms; five-shaft for weaving coloured cotton trouserings, both light and heavy, all from various counts; 16 looms per weaver; all weft re-wound.

1,466 looms, 40 in., 54 in. and 60 in. size, plain five-shaft and with dobbies; 16 looms per weaver; plain and fancy shirtings, etc.; ring-spun weft; weavers fill their own batteries.

All the above are typical examples of automatic sheds on the Continent. The loom speeds vary from 170 to 190 for the narrow

looms down to 135 for the 90 in. sheeting looms. There are, of course, many other installations, but most of them do not approach the ideal of mass production and their conditions and cloths vary so much that it is impossible to detail them.

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Readers interested in automatic looms will appreciate a recently issued book entitled "Automatic Looms," by William A. Hanton, M.Sc. (Tech.), Manchester, head of the Weaving Section of the Department of Textile Industries in the College of Technology, Manchester, and Lecturer in the University of Manchester, published by Ernest Benn, Ltd., London, at 21s. net.

This is a very timely publication, as many manufacturers are contemplating the installing of automatic looms. The book describes 28 makes of automatic looms and attachments. It deals with the cop-changing mechanism and describes the various shuttle-changing looms and the cop-changing attachment, as well as the multiple-box automatic looms. The automatic looms of all the leading manufacturers are described in detail. Chapters deal with yarns and yarn preparation for automatic looms, the organization of an automatic loom weaving shed, etc. The book is well illustrated and has a comprehensive index. The author goes into the costings. The book gives a full account of the latest and most successful types of automatic looms, and indicates the relative advantages as compared with ordinary looms.

The author says in his conclusions: "There can be very little doubt that Lancashire will have to adopt automatic looms in the near future if she is to continue to compete in the commoner types of cloth, whilst for many of the finer and more complex cloths there are advantages in automatic weaving that make it almost certain that that system will be adopted for most cotton fabrics."

A S. P.

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## The Eight-Loom Experiment in Burnley.

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In view of the large number of looms looked after by operatives in U.S.A. and Japan, the Lancashire Cotton Spinners and Manufacturers' Association came to an agreement with the Burnley District Weavers, Winders and Beamers' Association, i.e., the operatives' association, to make an experiment in 12 Burnley mills to run 4 per cent. of the looms on the basis of eight looms to each weaver.

The following are extracts from the operatives' newspaper, *The Cotton Factory Times*; it appears that the operatives' association has been criticized by other operative sections for having consented to this experiment in consequence of which the Burnley Association has issued a report, which is an interesting document.

It is pointed out that towards the end of last year the

Association received an application for a joint meeting to examine proposals by representatives of the Burnley Employers' Association, who had considered schemes for the improvement of the weaving trade in the district.

"At this joint meeting," the report states, "the representatives of the Employers' Association informed us that the bankruptcies and financial difficulties which had occurred among the employers in the Burnley district during the last few years had driven them to the conclusion that some change was inevitable if the remaining employers were to continue solvent, and employment provided for the operatives."

It was stated that in the last few years more than 20 firms in the Burnley district had become bankrupt or terminated business for financial reasons. These firms ran about 20,000 looms and employed about 5,000 weavers. Within this period it is calculated the homes of Burnley have been deprived of the regular wages of approximately 5,000 four-loom weavers—a sum of, say, £10,000 a week, or £500,000 a year.

"It was with this recognition of the past, present and prospective state of the industry that we considered the employers' proposal for a joint experiment . . . . It was, we considered, a subject for decision by the Amalgamated Weavers' Association, and accordingly we referred the subject to the Central Committee and the General Council of the Amalgamation.

"The attitude of the Central Committee towards this proposal was very similar to our own, and they held a number of meetings with representatives of the Burnley Employers' Association to formulate the terms of the experiment. Some of these meetings were contentious, and only after what appeared to be a breakdown in the consultations was an agreement upon the terms of experiment achieved."

As to criticism of the experiment the Weavers' Association Committee hold that there should be little displacement of regular weavers; that the number of looms a weaver can run depends upon the nature of the employment, not upon the number of looms, and that the amount of the standing wages paid will, in the aggregate, be somewhat higher than the wages earned by these weavers on their ordinary looms before the experiment.

Concluding, the report states that it is extremely important to endeavour to foresee all the possibilities which would, or could, be involved if the experiment proved to be economically advantageous, and adds: "But at this stage it is useless to argue about these possibilities. To say, therefore, that if the experiment proved to be economically advantageous to the employers they would enforce the general adoption of this method of weaving is to go beyond the present knowable facts; and to say that the experiment is for their benefit alone is to imply that we lack intelligence and capacity, and that we also lack loyalty to the members of the Association. When during these troubled years have we shown ourselves deficient in perception and capacity? And when during this time of stress, complexity, and irritation have we been deficient in loyalty? The experiment is an experiment, and at present it is nothing more. It may fail in every way. In one way or another some of the results from it may be put to good use."

In a leader the *Cotton Factory Times* makes some comments which are characteristic of the shortsightedness of the writer:—

“ In the Burnley Weavers’ Association journal the Secretary, Mr. J. Hindle, makes an exhaustive statement relative to the eight-loom experiment. According to his report the idea originated with the Burnley Employers’ Association, and was put forward after an acute investigation of the automatic and semi-automatic looms now on the market. As a result of this investigation it was decided to experiment with automatic, semi-automatic looms, and ordinary Lancashire looms with eight to each operative. The latter experiment is the one to which the operatives seem to take exception. Mr. Hindle estimates that during the last few years 5,000 fewer weavers have been required owing to firms becoming bankrupt, and that a sum of £10,000 per week is thus lost in wages. It is this aspect that appears to have been the deciding factor in gaining the operatives’ leaders’ acquiescence to the scheme. In brief, the terms of the experiment are as follows: A dozen employers in the Burnley district are allowed to run 4 per cent. of their looms on the basis of eight looms per weaver. Speed of looms reduced, and employers free to use any kind of weft. No sweeping, cleaning, weft-carrying or delivering of pieces. Weavers displaced to have priority over other weavers for regular looms. Wages during the three months to be 50s. standing wage. Agreed that at the end of three months a joint conference be held in order to devise a piece price rate of payment to operate for a further nine months instead of the standing wage. During the period of the experiment every facility to be given the employees’ representatives to collect relative information. Replying to criticism, Mr. Hindle states that the displacement of regular weavers will hardly affect the earnings of such operatives, because on an average 5 per cent. of weavers are usually off work owing to sickness or other private reasons. Thus, the weavers displaced will be employed on looms belonging to other weavers. In regard to the number of looms being excessive, he states that ‘ the number of looms a weaver can run depends upon the nature of the employment,’ and that where ordinary looms and Northrops are used weavers prefer to run 16 Northrops to four ordinary looms. He also lays stress on the fact that the standing wages paid are in excess of the ordinary earnings.

To analyse the position somewhat further, we will take as an example the effect of the eight-loom system in a shed of 1,000 looms. Four per cent. means 40 looms, and the displacement of 10 weavers. Five of these weavers will be necessary to do the weaving on the 40 looms, and one more in the capacity of assistant. Four weavers have thus to stand in the warehouse for “ sick ” work until other looms become vacant. When holiday time is drawing near sick work is not so easy to get, and weavers thrown on unemployment insurance naturally feel penalized. We submit that 4 per cent. is an excessive number, and the purpose of experiment would have been quite as well served by permitting each manufacturer to have one eight-loom weaver in his shed. It is far easier to find work for one displaced operative than for four. We certainly agree that the number of looms a weaver can run depends on the nature of the employment; in other words, on warp, weft, and mechanical assistance. In such an experiment manufacturers

will certainly see to it that failure will not be attributed to inferior warp and weft, but if the system passed the experimental stage a different tale would doubtless be told. The wages are slightly higher than can be earned off four looms (about 5s. difference), but is the weaver "paid" for her extra effort and responsibility? Her output work and responsibility are increased, and thus her physique is subjected to a greater strain than under ordinary circumstances. Does 5s. extra appear adequate payment from the trade union perspective? Even if the slower speed and the greater number of looms tended reduces the output per loom, say, 1s. 6d. on the weaving price per loom per week, that 'pays' the manufacturer very well, as the following figures show: Average per loom off four looms placed at 11s. or 44s. per week. Off eight looms weaving price at 9s. 6d. per loom (an excessive reduction) is 76s. Thus the manufacturer is left with 32s. per eight-loom weaver out of which to pay for assistance, and better warp and weft. If he pays an assistant to do the work incidental to weaving for each section of six eight-loom weavers, he has six times 32s., viz., £9 12s. out of which he can easily afford to pay £2 to the assistant. On such lines a manufacturer with 48 looms on the eight-loom system has £7 12s. weekly left for better material and profit, a most encouraging surplus. Weavers working under the system ought to 'make-up' their weekly output, and keep the figures relative to the amount received and that earned for reference.

We are pleased that Mr. Hindle has given the Burnley operatives such a thorough explanation of the why and wherefore of the system under consideration, but we feel that in the operatives' interest the number of looms permitted by the agreement is excessive. Consideration should also have been given to the question of payment for losses sustained by displaced weavers, for not only are they seriously inconvenienced by being moved about on 'sick' work, but their wages are bound to suffer in consequence. Such a joint agreement ought to have contained the clause that any financial loss sustained by the weaver ought to be made good by the organizations involved."

### BOMBAY COTTON MILL STRIKE.

This strike, which has been backed up by Communist agitators, does not yet show any signs of settlement, and the attitude of the Girni Kamgar Trade Union is as hostile as ever. The effect of it is seen in the diminished yarn and cloth production figures of our present issue. (See Statistics, pp. 707-8.)

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MEXICAN COTTON INDUSTRY.

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Of the 161 cotton mills in Mexico, 144 were operating at the close of the six-month period ended April 30, 1928, according to a report issued by the Mexican Bureau of Special Taxes. The capital investment of the industry was reported as 76,423,235 pesos (approximately \$37,088,196), and the operatives employed numbered 39,255. The aggregate number of mill hours worked declined to 223,177 from 255,258 for the previous half-year, and cotton consumed in the manufacture of yarn, cloth, knit goods and other cotton manufactures amounted to 87,020 bales, compared with 97,296 in the preceding period. Cotton cloth produced during the April 30 six-month period amounted to 33,796,941 lbs., a decrease from 38,441,330 for the half-year ended October 31, 1927, the quantity of yarn spun increased from 3,832,878 lbs. to 4,170,887; and the output of knit goods decreased from 740,737 to 737,280 lbs.

The basic cause of the existing depression in the Mexican cotton industry appears to be reduced buying power, resulting from prevailing difficult economic conditions. The closing of some mills without permits and the acute financial condition of others led the Government to authorize some to work half time, with a view to reducing stocks. This concession became more or less general in July, 1928, when mill owners in Puebla and Tlaxcala were permitted to arrive at an agreement with the employees to operate only 32 hours per week, but failed to give the relief desired. As a result a large number of companies in these districts decided to suspend activities indefinitely on October 24, 1928. The Ministry of Industry, Commerce and Labour and the President of the Republic, however, on October 15, issued a notice to the effect that the projected closing of the mills would be considered "illegal and an attempt against the social order," and proposed that the President be named arbiter in the matter of suspension of operations as well as of contracts, hours, and wages—the decision of the President to be effective for a period of four months.

The latter proposal was accepted by both parties and employers rescinded their order for closing on October 24. The decision of the President was made public October 22 and provided, among other things, first, that the factories would continue to operate on shifts of 24 hours per week until February 23, 1929; second, that any proposed reduction of employees was to be submitted for approval to the Ministry of Industry, Commerce and Labour; and third, that a commission be appointed to study the problems of the industry and to propose measures for its relief.

In the early part of November the cotton manufacturers affected

by this arbitral decision began on an extensive scale, under the supervision of inspectors of the Ministry of Industry, Commerce and Labour, the readjustment in personnel provided for in the decision. The commission of experts, appointed by the President during the latter part of November, initiated its labours early in December, but by January, 1929, reported that it was encountering difficulties. The commission requested an extension up to March 31, 1929, of the terms of the decision made by the President, which was granted.

A statement issued by President Portes Gil on March 30, 1929, provides that all textile mills that reduced the number of working hours shall return to a normal production output within a period of 60 days; further, the Department of Industry, Commerce and Labour shall appoint a commission to regulate the output of textiles and establish a stock exchange, with a view toward stabilizing the price of cotton and regulating the market for this fibre; and take steps to reduce the number of unemployed textile labourers. These provisions apply to woollen, linen, knit-goods, jute and silk factories, in addition to cotton mills. (*U.S. Commerce Reports.*)

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### ENGLISH TRADE UNION ATTITUDE TO DOUBLE SHIFTS.

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It seems strange that in these depressed times mill operatives should be willing to go on strike because of employers introducing the double-shift system. At a Bolton mill—the Orient mill—the employees have for about two months been working in two shifts—40 from 6 a.m. to 2 p.m. and 40 more from 2 p.m. to 10 p.m. The unions contend that this is a breach of the 48-hour agreement, which stipulates working time to be from 7-45 a.m. to 5-30 p.m., with a dinner-hour break. The firm have expressed the view that to force a stoppage through the weavers (the winders are not organized) was unfair, as it was to meet the weavers' needs that the double shifts were worked, the winding plant having been extended, for artificial silk winding, to the capacity of the premises. They suggested to the trade union that six months should be allowed them in which to make other winding arrangements. Finally, three months was agreed upon. The firm gave a guarantee that double-shift working would cease within three months from June 1, providing the union officials would recommend the operatives to accept such a settlement. This the officials did, and the operatives acted on the advice.

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### THE MILL STRIKE IN BOMBAY.

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The strike situation in Bombay during the current month and the methods of the extremist labour leaders leave very little doubt regarding the pernicious influence of Communism on an ignorant and illiterate class of factory workers. The general strike of April, 1929, has not been due to lower wages or other hardships among the workpeople, but has been due to the employment of 6,000 men

in the Wadia group of mills in place of those who left work with a lightning strike. The Girm Kamgar Union wanted these 6,000 men to be replaced by the strikers, which the mill owners very rightly refused to do, and by open intimidation and unwarranted accusations of cruelty against the employers, even the loyal and peaceful workers were prevented from attending the factories. Thus the fight lay between millhands who wanted to earn their living and the irresponsible labour leaders who wanted to deprive them of it by threats and violence. No public body in the city—civic, industrial or commercial, and not even the political leaders—showed any sympathy with the Girm Kamgar Union in their attempt to bring about the ruin of the National Industry of India under the guise of the liberation of the labourers from the tyranny of their masters.

The British Trade Union Congress, The Indian Merchants' Chamber, The Bombay Chamber of Commerce, The European Textile Association, the Piece Goods Association and, above all, the Bombay Textile Labour Union unanimously condemned the wild and inflammatory writings and speeches of men who could no longer hide the Soviet influence that is bringing ruin to investors in cotton mills and general hardships to the citizens of Bombay, with starvation for the misguided mill workers.

The main points of dispute between the mill owners and the strike leaders were almost all settled under the advice and suggestions of the Fawcett Committee, and practically all the mills were working peaceably till April 26, and the industry seemed to be settling down again on a peaceful basis between capital and labour. Nearly 95 per cent. of the mill operatives appeared willing to resume work, but the evil influences which have been sapping the blood of the working classes had once again an upper hand and succeeded in disturbing the peace and tranquillity of the city as a whole.

The mill owners and industrial leaders have been pressing for relief in the shape of protective tariffs, which would improve the financial position of the cotton mills and enable them to increase the wages of the operatives. It seems doubtful, however, that even with these improved conditions peace can be retained between capital and labour so long as the seeds of discord and discontent are continued to be sown among the ignorant classes by the paid hirelings of foreign communists in India. (*The Indian Textile Journal*.)

## CAUSES OF STRIKES IN BOMBAY : THE REMEDY.

### MILLS UNABLE TO PAY.

At the second quarterly meeting of the Maharashtra Chamber of Commerce held at Bombay, Mr. Walchand Hirachand, the President, in his opening speech reviewing the condition of the textile industry and the real causes of frequent strikes in Bombay, said that the mill industry was not in a position to pay increased wages to the workers, which, however, was a legitimate demand on the part of the men, as they had not received any increase for some years past. According to him, the whole industrial trouble was due to the worker's desire to have "increased means to better his

life" as his wants had increased and his wages were inadequate. To make it possible for the industry to earn more, he urged that protection should be given to it "for a period of five or seven years by increasing the import duty on foreign cloth by a further 10 per cent., the workers to receive one-fourth of this 10 per cent. increase, which is roughly the proportion of wages in the cost of production at present." Referring to the question of general economic depression, he condemned the "manipulations" of the exchange ratio, which "created a sense of uncertainty and instability in business and industry," and to set matters right he suggested that the only sovereign remedy was to introduce gold currency in the country (*Indian Textile Journal*.)

### SPINNERS' MARGIN.

Spinners' margin is the ratio between the price of American 32-twist cotton yarn in Manchester and the Liverpool price of middling American cotton. Normally, the price of 32-twist should be 60 per cent. above the spot price of American middling cotton according to Dr. A. B. Cox. If prices change so that the ratio increases, the spinners' margin of profit is increased and thereby the demand for cotton is strengthened. On the other hand, when the ratio decreases, the spinners' margin is also relatively decreased, and then the demand for cotton falls.

	1929	1928	1927	1926
January .. ..	152	149	174	150
February . . .	151	151	179	160
March ... ..	148	150	173	156
April .. . . .	150	149	168	155
May ... ..	—	149	165	153
June ... ..	—	148	172	157
July ... ..	—	147	167	158
August ... ..	—	154	164	160
September . .	—	152	156	166
October ... ..	—	148	156	194
November ...	—	152	148	187
December ...	—	151	147	186

Normal = 160

### AUSTRALIAN DUTIES ON COTTON YARN.

The operation of the deferred duty on cotton yarns, including mercerized cotton yarn, imported into Australia has been postponed until October 1, 1929. The present general duty is 5 per cent. *ad valorem*, with British yarns admitted free, and the deferred general duty is 35 per cent. *ad valorem*, with British yarns admitted at 20 per cent. *ad valorem*. These deferred rates have been provided for in the Australian tariff as a measure of protection when the local industry reaches a substantial size to warrant their application. They may be brought into operation by departmental action and do not require legislative action. The operation of this deferred

duty has been postponed a number of times as the industry has not reached the stage where the customs authorities feel that the additional protection is required (*Trade Commissioner S. R. Peabody, Melbourne.*)

## YARN COUNTS SPUN IN U.S.A.

Special Bulletin 63T of the Textile Division, Washington, D.C., gives the following particulars:—

### YARN CONSUMED AND PRODUCED FOR SALE IN 1927.

Mills engaged primarily in the production of cotton goods reported an output of 2,327,011,000 pounds of cotton yarn for their own consumption and 649, 666,000 for sale and in addition purchased 141,039,000 lbs. of yarn in 1927. Of the yarns produced for consumption, 1,188,685,000 lbs., of 51 per cent., were 20's and under and 990,952,000 lbs., or 42.6 per cent., were 21's to 40's, inclusive. The ratio does not vary greatly in yarns produced for sale, of which 335,140,000 lbs., or 51.3 per cent., were counts up to and including 20's, and 235,370,000 lbs., or 36.2 per cent., were 21's to 40's, inclusive.

Of the yarn produced for their own consumption by southern mills (1,683,751,000 lbs.), 57.4 per cent., consisted of counts up to and including 20's, 40.5 per cent. were 21's to 40's, and 17.6 per cent. were 41's to 60's. New England mills, which in general weave finer goods, produced 565,861,000 lbs. of yarn for their own consumption, of which 31.8 per cent. comprised 20's and under; 48.7 per cent. 21's to 40's, and 16.9 per cent. 41's to 60's, inclusive.

### YARN PRODUCTION AND CONSUMPTION SUMMARIZED BY COUNTS.

The following table shows United States production of cotton yarn for consumption and sale, as well as yarn purchased by counts for the calendar year 1927, as reported by the Bureau of Census: Yarns used (produced for own consumption and purchased) and yarns produced for sale by counts for the United States as a whole, and by sections during 1927.

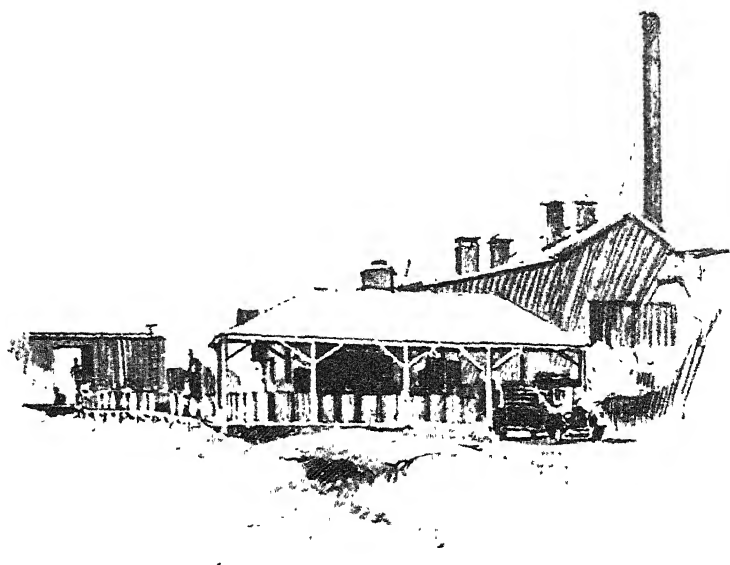
Section and Count				Produced for own consumption	Purchased	Yarns produced for sale
				lbs.	lbs.	lbs.
Cotton-growing States						
20's and under	..	..		967,297,667	19,929,918	291,001,249
21's to 40's	..	..	..	681,204,169	17,395,032	187,694,109
41's to 60's	..	..	..	29,686,488	2,587,254	44,632,208
61's to 80's	..	..	..	5,056,079	54,459	20,159,023
Over 80's	..	..	..	506,211	8,992	2,831,418
Total				1,683,750,614	39,975,655	546,318,007

## YARN COUNTS SPUN IN U.S.A.—Continued.

Section and Count	Produced for own consumption lbs	Purchased lbs.	Yarns produced for sale lbs.
New England States :			
20's and under .. ..	179,817,599	17,585,195	28,685,520
21's to 40's .. ..	275,361,579	20,699,048	44,322,180
41's to 60's .. ..	95,398,487	5,260,252	8,101,787
61's to 80's .. ..	8,048,770	769,268	1,211,178
Over 80's .. ..	7,234,728	796,113	1,881,841
Total .. ..	<u>565,861,163</u>	<u>45,109,876</u>	<u>84,202,506</u>
All other States :			
20's and under .. ..	41,569,479	35,024,930	15,452,925
21's to 40's .. ..	34,385,939	18,580,530	3,354,029
Over 40's .. ..	1,443,893	2,347,528	338,789
Total .. ..	<u>77,399,311</u>	<u>55,952,988</u>	<u>19,145,743</u>
United States, total			
20's and under .. ..	1,188,684,745	72,540,043	335,139,694
21's to 40's .. ..	990,951,687	56,674,610	235,370,318
41's to 60's .. ..	126,528,868	9,500,307	53,072,548
61's to 80's .. ..	13,104,849	1,306,933	21,370,437
81's to 100's .. ..	5,669,374	871,295	3,973,434
Over 100's .. ..	2,071,565	145,331	739,825
Total .. ..	<u>2,327,011,088</u>	<u>141,038,519</u>	<u>649,666,256</u>

Exports of cotton yarn and thread from the United States during the three months ended March, 1929, were as follows:—

	lbs.	Value \$
Carded yarn .. ..	4,306,794	1,430,975
Combed yarn .. ..	3,871,809	3,123,391
Sewing, crochet, darning and embroidery cotton .. ..	321,826	305,468



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# MISCELLANEOUS

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## Cotton and the Belgian Cotton Industry.

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**M**R. ROBERT P. PFLIEGER, B.A., Yale University, who is known to many cotton spinners not only in Belgium (where he is established as a cotton merchant) but also abroad, has contributed to the *Bulletin de Documentation Economique et Financière* de MM. Raymond Buurmans & Cie, an instructive article which we reproduce in part. Mr. Pflieger's remarks on the "interchangeability" of East Indian and American cotton, on the Congo cotton and post-war changes are very interesting. Mr. Pflieger's article is as follows:—

### LE COTON ET L'INDUSTRIE COTONNIÈRE BELGE.

L'industrie cotonnière belge, exception faite pour le coton du Congo, est entièrement tributaire de l'étranger pour les matières premières qui lui sont indispensables. Un calcul appro en cours, nous montre que son ximatif, basé sur la moyenne des prix de la saison approvisionnement lui coûtera cette année-ci plus d'un milliard de francs. Il s'agit, bien entendu, de francs-papiers, dont la majeure partie — environ 800 millions — ira aux États-Unis, tandis que les Indes anglaises recevront à peu près 375 millions, sans mentionner les sommes, comparativement négligeables, transférées à l'Égypte et à deux ou trois autres pays.

A part de rares filatures qui produisent des filés fins, pour lesquels le coton égyptien — de fibre longue et résistante — est indispensable, les usines belges se sont spécialisées dans la fabrication des numéros moyens, voire des gros numéros. Elle ne consomment donc — sauf exception notées ci-dessous — que le coton d'Amérique et des Indes.

Ce sont les cotons américains qui nécessitent — et de loin — les plus gros décaissements de fonds. Leur supériorité de classement et de soie sur les cotons des Indes (tout au moins en ce qui concerne les qualités employées de façon courante) entre pour la meilleur part dans cette différence. La question des poids joue aussi un rôle, à un nombre égal de balles, car les balles d'Amérique pèsent environ 500 lbs. et celles des Indes, de façon générale, 400 lbs. seulement.

Les importations de coton des Indes atteignaient, il y a une vingtaine d'années, à peine la moitié du nombre de balles provenant des États-Unis. Il y eut cependant, à partir de cette époque, une augmentation très sensible des achats de cotons indiens par la filature belge. Le graphique A montre la marche ascendante (évidemment interrompue par les années de guerre) de la consommation des deux variétés de coton, et celle, particulièrement rapide depuis 1920, du coton des Indes, dont les importations sont parfois même arrivées à dépasser celles du coton américain.

Les raisons de cette évolution sont dues à un concours de circonstances variées. Le coton Américain était, dès le début, le "Staple article" de la filature. Ce n'est que petit à petit que le coton des Indes parvint, d'abord à prendre pied dans le marché belge, puis à s'y assurer une place qui grandissait au fur et à mesure que l'on apprenait à connaître le parti qu'il y avait moyen d'en tirer. L'amélioration indiscutable de certaines variétés indiennes entraînait, sans aucun doute, pour une bonne part dans la vogue croissante du coton de cette origine.

Les causes déterminantes de l'augmentation rapide des importations de Bombay, de Madras, ou de Karachi, paraissent cependant dues surtout à des raisons économiques. La Belgique, pays exportateur, en était tout naturellement arrivée à se spécialiser dans la fabrication de tissus d'usage courant, susceptibles d'être vendus à des prix avantageux, et, par conséquent, de trouver un placement rapide sur les marchés étrangers. Ce genre de fabrication, d'autre part, convenait particulièrement bien à l'ouvrier flamand, mieux adapté à la production de ces genres qu'à celle des qualités plus fines, où excellaient les ouvriers du Lancashire ou des Vosges. Le coton des Indes étant le moins cher des deux, c'est évidemment celui dont l'emploi s'est le plus répandu. L'expérience, d'autre part, avait enseigné qu'il existait, dans la très grande variété des qualités indiennes, certains types donnant d'excellents résultats lorsqu'ils étaient employés soit purs, soit en mélange avec d'autres cotons, pour la confection d'articles où le coton d'Amérique avait jusqu'alors paru indispensable. Comme, finalement, l'impérieuse nécessité, soit d'améliorer un produit invariablement fabriqué au moyen de la même matière première, soit de maintenir le standard d'une qualité donnée, tout en employant, pour la faire, une matière moins chère, avait eu comme résultat l'apparition de perfectionnement importants dans le nettoyage ou le filage, toute une gamme de types inemployés jusqu'alors reçurent un champ d'application. Celui-ci ne tarda pas à s'élargir de jour en jour.

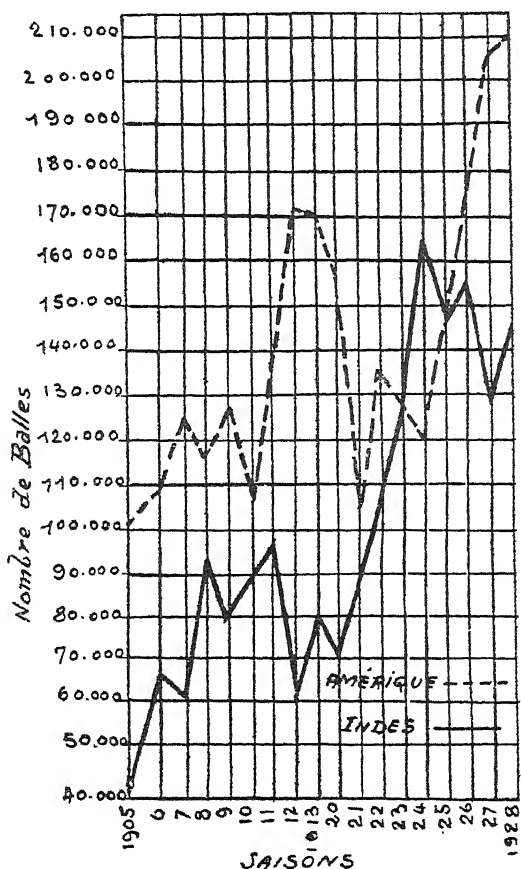
Il est hors de doute que c'est à son esprit d'entreprise et à sa faculté d'adaptation que la filature belge doit d'avoir été relativement prospère dans les moments où les usines de certains autres pays luttèrent péniblement pour placer, sur les marchés mondiaux, des tissus et du fil, fabriqués avec une matière première "classique," et trop chère.

Le coût du coton joue un rôle forcément considérable dans la prospérité de l'industrie. Si les affaires sont stimulées par de bas prix, elles sont, par contre, arrêtées par des prix élevés. Ce truisme, toutefois, n'est exact que dans les grandes lignes. Les cours, en juillet 1920, étaient exorbitants, et pourtant ils n'apportaient aucune entrave aux achats, bien au contraire ! Le terme cotait 43 cents à New-York, ce qui était un prix que l'on n'avait plus revu depuis la guerre de Sécession, et pourtant, jamais on n'avait acheté aussi libéralement. Le monde entier, aveuglé par les effets d'un boom dont l'influence s'étendait à tous les marchés, et persuadé que rien ne pouvait entraver une demande sans cesse croissante, ni empêcher une pénurie de matière et de main-d'œuvre toujours plus aiguë, surenchérisait sur les offres les plus déraisonnables. Huit mois plus tard, on était retombé au niveau d'avant-guerre ; le terme janvier, à New-York, atteignait 12.30 cents, ce qui était, eu égard à la diminution du pouvoir d'achat de l'or, un prix vraiment bas. Personne, cependant, n'achetait ; la

consommation se restreignait, toutes les usines, toutes les industries étant touchées par la crise.

La détermination de ce qui, après guerre, peut être considéré comme un prix élevé, ou comme un prix bas, prête nécessairement à discussion, aussi est-il impossible de faire prévaloir un point de vue absolu. Il semblerait cependant que l'on pût considérer une base inférieure à 18 cents la lb., pour le terme New-York, comme un cours favorable, 18 à 20 cents comme un prix moyen, 20 à 22 comme un niveau plutôt élevé, et une limite supérieure à 22 cents comme chère.

Un calcul de prix de revient plus ou moins exact devrait, évidemment, encore tenir compte des "écarts," c'est-à-dire des différences à payer, sur ou sous le terme, pour s'assurer certaines qualités déterminées, et les acheter cif ou fob Gand ou Anvers. Ces "écarts" varient non seulement chaque saison, mais fluctuent au cours d'une même saison, au gré de l'approvisionnement réel ou des perspectives de stocks de chaque classement ou de chaque soie, du taux des frets, et des exigences des vendeurs, pour ne citer que les causes principales. Pendant l'année en cours, par exemple, il est hors de doute que la baisse anormale des "écarts" a été causée par la hâte avec laquelle les vendeurs ont procédé à la mise au marché de leur production — hâte provoquée



par les difficultés qu'ils rencontrèrent à obtenir des avances de leurs banquiers, lesquels, à leur tour, trouvaient à Wall Street un emploi beaucoup plus rémunérateur — et plus sûr — pour leurs disponibilités.

Il n'y a cependant pas, pour le coton, que son prix absolu (lequel, dans ses grandes fluctuations, est guidé par le marché de New-York) qui ait une influence directe sur la consommation. Il y a aussi la parité entre le coton d'Amérique et celui des Indes qui joue un rôle très important pour la filature belge. Les différences dans la consommation des deux variétés indiquent clairement l'influence déterminante de ce facteur. Le graphique A indique qu'en 1924 la consommation d'Indes a dépassé celle des Amériques de plus de 40,000 balles. Cette année-là, à la suite d'une succession de trois mauvaises récoltes aux Etats-Unis, de très vives craintes furent ressenties au sujet des approvisionnements mondiaux ; cette alarme se traduisit par une poussée sensationnelle des prix, lesquels, fin novembre, frôlèrent 38 cents. Tous les autres cotons subirent forcément les effets de cette hausse, quoique de façon moins prononcée ; bien que chers en réalité, les cotons des Indes, par exemple, restèrent bon marché en comparaison du coût des Amériques. Cette différence de prix de revient eut une répercussion presque automatique sur les achats de la filature, qui importa 121,000 balles d'Amérique et 163,000 balles des Indes, contre 129,000 et 126,000 balles pour la saison précédente.

Le contraire se produisit en 1926-27, lorsque, sous le poids d'une récolte américaine phénoménale, les cours du terme à New-York s'effondrèrent en dessous de 12 cents. La récolte indienne, par contre, avait très mal réussi (5,218,000 balles contre 6,131,000 la saison précédente, d'après l'estimation de Ralli Bros.) de sorte que les cotons des Indes, étant relativement hors prix, furent employés dans des proportions beaucoup moindres : 129,000 balles contre 207,000 balles d'Amérique.

Cette " interchangeabilité " si l'on peut dire, des deux principales variétés de coton employées en Belgique est, dans la pratique, forcément limitée par plusieurs facteurs : possibilités matérielles d'adaptation des machines, demande de la clientèle, exigences de la main-d'œuvre, pour ne citer que les principaux. Mais il existe, malgré tout, entre les deux, une espèce de " no cotton's land " assez étendu. Il est certain que les plus beaux types de cotons des Indes, comme les Tinnivellies, les Karanganis, les Surtis, les American Surats, les Broach peuvent être employés, sinon comme substituts complets pour les Amériques, tout au moins en mélange avec ces derniers, dans une proportion assez considérable. Par contre, les bas classements de coton Amérique (dont il y eut précisément abondance en 1926-27) sont susceptibles, lorsqu'ils sont teintés, de remplacer jusqu'à un certain point les Westerns et les Northerns ; d'autre part, lorsqu'ils ne sont pas de nuance trop terne, et qu'ils possèdent une résistance de

soie suffisante, ils s'allient parfaitement bien aux Oomras, et en améliorent même le rendement.

Afin de se libérer, dans la mesure du possible, de la tutelle étrangère, la Belgique fut tout naturellement amenée à s'intéresser aux possibilités qu'offrait la culture du coton dans sa colonie. Ces essais ont été couronnés de succès, ainsi que le prouvent les statistiques officielles suivantes concernant la production du Congo :

1916	.	4 tonnes	1921	..	665 tonnes
1917	..	20 "	1922	..	.. 1,000 "
1918	..	140 "	1923	..	.. 890 "
1919	..	215 "	1924	..	.. 1,580 "
1920	..	335 "	1925	..	.. 3,165 "
			1926	.	.. 4,000 "

De nouveaux groupements s'intéressant à la culture et à l'égrenage du coton congolais, il est certain que cette production ira, dans l'avenir, suivant un rythme croissant, et atteindra rapidement 15 ou 20,000 tonnes — peut-être davantage. Il est, de toute façon, nécessaire qu'il y ait abondance de coton : d'une part, les besoins de la consommation augmentent sans cesse; d'autre part, le développement de la filature américaine est tel, qu'il faut prévoir le jour où la récolte entière des Etats du Sud se verra absorbée par les filatures de l'endroit. C'est alors que l'appoint des cotons de l'Uélé, du Kivu, du Maniéma, du Lomami, du Kasai, joueront un rôle vraiment important dans l'économie du pays.

Il convient évidemment d'estimer à ses justes proportions l'importance que pourrait éventuellement avoir le coton du Congo pour les besoins locaux. Certains optimistes n'ont-ils pas été jusqu'à prédire que la colonie arriverait à suffire à la totalité des besoins de la métropole ? Il est, certes, hors de doute que l'usage du coton du Congo doit s'étendre davantage. Une sélection sévère des graines convenant le mieux à chaque région, un renouvellement fréquent de ces semences, afin d'obvier à une dégénérescence autrement inéluctable, et un égrenage particulièrement soigné, ont contribué à l'amélioration notable des qualités produites au cours des saisons récentes. Il reste cependant beaucoup à faire dans ce domaine, car il est certain que le programme réalisé est petit en comparaison de celui qu'il est permis d'espérer.

L'expérience acquise en d'autres régions cotonnières fait entrevoir qu'il y aura, pour augmenter la production au delà d'un certain point, de grandes difficultés à surmonter. Le manque de main-d'œuvre, la quasi-impossibilité d'exiger du noir les soins absolument indispensables à la prévention des maladies, et l'impossibilité matérielle d'augmenter le rendement sans un surcroît prohibitif de dépenses, font présumer que le développement de la culture du coton au Congo ne suivra pas la progression géométrique qu'il paraît si aisé d'établir dans un calcul théorique. Il semblerait que la politique la plus avisée dût consister à intensifier l'effort nécessaire à l'amélioration de la *soie* de coton, et à

en favoriser tout spécialement le développement dans les quelques régions de l'Uélé et du Kivu susceptibles de fournir une matière de couleur plus blanche que la qualité récoltée de façon courante. Le producteur retirerait de cette façon d'agir le double bénéfice d'une vente infiniment plus facile et plus rémunératrice, et la satisfaction de pouvoir offrir aux usines du pays un genre de coton vraiment apprécié, et répondant exactement à leurs besoins.

Pour mémoire, et avant de terminer l'énumération des variétés de coton employées par les filateurs locales, il sied de mentionner celle d'Asie Mineure, et celles provenant de divers pays sud-américains. Ces qualités, cependant, jouent dans la consommation un rôle tout à fait secondaire.

Les conditions d'importation du coton, du fait de la guerre, ont subi des modifications très importantes. Les Etats-Unis, avant 1914, ne disposaient pas des moyens nécessaires pour financer une récolte produite en trois ou quatre mois, et consommée en douze. Les négociants des centres cotonniers européens intervenaient alors, et une bonne partie des stocks était achetée par des maisons de Liverpool, de Brême et du Havre. C'est à ces négociants que la filature belge s'adressait pour satisfaire tout au moins une bonne partie de ses besoins. Aujourd'hui, par contre, la quasi-totalité des achats de coton d'Amérique est faite à des exportateurs du pays d'origine, par l'intermédiaire de leurs représentants locaux.

D'autre part, alors qu'avant la guerre la plupart des ventes de coton américain se traitaient en francs, la majeure partie des affaires se concluent actuellement en dollars. Les fluctuations auxquelles la valeur du franc fut soumise, pendant de longues années, constituent une des raisons principales de ce changement. Une autre cause, et non des moindres, réside dans les variations du prix de la matière brute. Un écart de quatre à cinq cents points (\$0.04 à \$0.05 la lb.) était jadis — sauf très rares exceptions — à peu près le maximum de différence concevable entre les extrêmes de prix d'une saison. Dans les années qui suivirent le rétablissement de la paix, cependant, l'on vit des fluctuations de plus de trois mille points, et des écarts de deux cents points par jour n'étonnaient plus personne. Dans ces conditions, des achats fermes devenaient extrêmement périlleux, aussi la coutume s'établit-elle d'acheter "on call," c'est-à-dire de déterminer simplement d'avance la prime à payer, au-dessus des cours du terme, pour une certaine qualité, rendue au port de destination. L'acheteur, dans ce cas, avait l'avantage de pouvoir "fixer" son coton, c'est-à-dire d'en arrêter le prix définitif, seulement à l'époque où il en prenait livraison, parfois plus tard. Il pouvait ainsi attendre, avant de déterminer son prix de facture, soit qu'il eut exécuté une vente de filés en contre-partie, soit que les cours eussent baissé suffisamment pour lui permettre d'envisager avec moins de risques un achat somme toute spéculatif. Le vendeur américain, de son côté, se couvrait par une vente de terme, lorsqu'il achetait au producteur les qualités qu'il s'était engagé à livrer, et il ne dénouait l'opération qu'au reçu d'un ordre de "fixation" de son client. Ce genre d'affaires, entré dans la pratique courante, ne pouvait se traiter facilement qu'en dollars.

La filature cotonnière belge s'est beaucoup développée depuis sept ans : signe indiscutable de prospérité. Il en est, d'ailleurs, de même du tissage.

## Comparison of Cotton Grey Cloth Prices in New York, Manchester, Osaka, Bombay, Calcutta and Madras.

(Source : *The Bureau of Foreign and Domestic Commerce, Washington, D.C.; published Bulletin No. 50-G, Textile Division*).

### PRICES OF COTTON GREY CLOTHS IN REPRESENTATIVES MARKETS

Prices of representative grey cloths in the New York market averaged \$0.3808 per lb. for the first four months of 1929, compared with \$0.3897 for the corresponding period of last year. Manchester quotations for comparable British cloth were slightly lower than American prices, averaging \$0.3800 per lb. during the first four months of 1929 as against \$0.3789 per lb. for the corresponding period of 1928. Osaka prices for similar Japanese cloths over the 1929 period are not yet available, but generally have been 4 to 5 cents lower than British and American quotations. Bombay prices for Indian-made cloths averaged \$0.3487 for the March quarter of 1929. Calcutta quotations on six imported grey shirtings for the first quarter of 1929 averaged \$0.3960, compared with an average of \$0.3798 for British cloths during that period. Madras prices are not strictly comparable with those for other markets, inasmuch as they are based on imported goods which are somewhat wider than those used for other markets and usually run about 15 cents a lb. higher than Calcutta quotations. Madras prices averaged \$0.543 for the first quarter of 1929.

Grey cloths used as a basis of these price compilations for the various markets averaged as follows:—

Market and cloths used	Width in in.	Thread counts per sq. in.	Yards per lb.	Sq. yards. per lb.
New York—3 sheetings and 4 print cloths .. .. .	36·7	62 × 62	4·82	4·91
Manchester—5 shirtings and 2 printers .. .. .	36·6	65 × 62	4·99	5·07
Osaka—3 sheetings, 3 shirtings, and 1 T-cloth .. .. .	36·82	57 × 56	4·38	4·48
Bombay—2 longcloths, 1 shirt- ing, 1 T-cloth, and 2 domes- tics, all Indian-made ..	31·5	*	4·65	4·07
Calcutta—6 imported shirtings	37·7	69 × 65	4·22	4·42
Madras—5 shirtings, 2 dhooties, and 1 jaconet, all imported ..	46	64 × 54	4·12	5·26

\* About 96 threads in warp and filling to the square inch.

Quarterly average prices for 1928 and weekly prices for 1929 follow:—

PRICES OF COTTON GREY CLOTH IN REPRESENTATIVE PRODUCING CENTRES.

		(Cents per lb. at current exchange)					
Period		New York	Manchester	Osaka	Bombay	Calcutta	Madras
Quarterly average		cents	cents	cents	cents	cents	cents
January-March	..	39.04	37.59	32.62	33.33	39.19	56.55
April-June	..	39.11	39.18	33.09	34.29	39.44	55.25
July-September	..	38.90	38.05	32.62	34.16	39.30	54.22
October-December	..	39.09	37.87	33.79	34.33	39.65	54.48
Week ended							
January	5 ..	38.70	38.11	34.14	35.04	39.64	54.37
"	12 ..	38.48	37.84	*	35.02	39.62	54.34
"	19 ..	38.36	38.21	33.39	35.02	39.61	54.34
"	26 ..	38.36	37.91	33.35	35.00	39.60	54.31
February	2 ..	37.90	37.74	33.23	34.94	39.63	54.36
"	9 ..	37.47	37.36	*	34.84	39.52	54.20
"	16 ..	37.40	37.91	33.47	34.83	39.51	54.20
"	23 ..	37.32	37.56	33.01	34.85	39.53	54.22
March	2 ..	37.32	38.03	*	34.75	39.52	54.21
"	9 ..	37.93	38.17	32.59	34.74	39.52	54.21
"	16 ..	38.86	38.27	*	34.66	39.53	54.23
"	23 ..	38.96	38.39	*	34.65	39.52	54.21
"	30 ..	38.88	38.19	*	34.94†	40.00†	55.27
Quarterly average		38.15	37.98	—	34.87	39.60	54.34
April	6 ..	38.18	38.13	*	34.92†	39.97†	55.23
"	13 ..	37.87	38.19	*	34.72†	39.96†	55.22
"	20 ..	37.75	38.16	*	34.70†	39.94†	55.20
"	27 ..	37.60	37.78	*	*	*	*
May	2 ..	36.97	37.10	—	—	—	—
"	9 ..	36.54	37.02	—	—	—	—
"	16 ..	34.47	36.87	—	—	—	—
"	23 ..	36.16	36.37†	—	—	—	—

\* Not received.

† Cabled prices, subject to confirmation.

PRICES OF A THREE-YARD JAPANESE SHEETING IN ALEXANDRIA (EGYPT).

The following table gives average weekly quotations for imported spot goods, in transit at Port Said, for a 36-inch, 46 × 46, 3-yard Japanese grey sheeting, weighing about 13 lbs. per 40-yard piece. These spot prices are for goods in bonded warehouses and include all costs of unloading, portorage, and warehouse charges incidental to delivery. The price, however, does not include customs duty, insurance, nor storage charges which may accumulate while the goods are in bonded warehouses. Prices for the first five months of 1928 and 1929 follow:—

SPOT PRICES PER PIECE OF 40 YARDS.

Week ended		1928	1929	Week ended		1928	1929
		\$	\$			\$	\$
January	5 ..	3.67	3.98	March	23 ..	3.64	4.00
"	12 ..	3.66	4.00	"	30 ..	3.65	4.00
"	19 ..	3.59	4.00				
"	26 ..	3.54	4.00	Quarterly average		3.56	4.00
February	2 ..	3.46	4.00				
"	9 ..	3.41	3.98	April	6 ..	3.63	3.96
"	16 ..	3.47	3.96	"	13 ..	3.59	3.95
"	23 ..	3.55	4.00	"	20 ..	3.58	3.96
March	2 ..	3.59	4.08	"	27 ..	3.59	3.92
"	9 ..	3.56	4.02	May	4 ..	3.65	3.92
"	16 ..	3.55	4.02				

## NEW YORK COTTON EXCHANGE TRADING IN TEXTILE SECURITIES.

About the middle of July trading in textile securities will be started on the floor of the New York Cotton Exchange. Mr. John H. McFadden, jr., of George H. McFadden & Brother, is the Chairman of the New York Cotton Exchange's Security Department. Mr. McFadden stated recently that the securities they are listing are for the most part stocks of companies of the textile industry that heretofore have either been inactive in trading or have been transferred in what are known as over-the-counter trades. Some few stocks of the industry have been listed elsewhere but only a very few. The market being set up in the cotton exchange will undoubtedly serve to bring the activities of our industry before the public, and the results should be decidedly beneficial to the cloth manufacturing trade.

## INDIA'S COTTON GOODS IMPORTS.

The Indian Trade Commissioner in London has prepared the following interesting table of cotton imports into India before the war, during the war, and in the financial year 1928-29:—

					(000's omitted).		
					Pre-war Average Yds	War-time Average Yds.	1928-9 Yds.
Grey goods—total	..	..	..	..	1,331,017	904,874	838,643
From U.K.	.	..	..	..	1,315,997	815,197	581,618
<b>From Japan</b>	..	..	..	..	2,559	81,171	241,746
From U S A.	..	..	..	..	10,405	7,356	1,567
White goods—total	..	..	..	..	654,255	518,890	554,078
From U K.	..	..	..	..	624,871	500,036	525,361
From Netherlands	..	..	..	..	7,606	3,824	8,415
From Switzerland	..	..	..	..	2,606	762	8,711
<b>From Japan</b>	..	..	..	..	48	3,323	5,461
Coloured goods—total	..	..	..	..	631,552	386,277	506,936
From U.K.	..	..	..	..	590,462	350,826	335,606
From Netherlands	..	..	..	..	15,219	8,788	11,256
From Switzerland	..	..	..	..	2,655	1,734	2,292
From Italy	..	..	..	..	10,320	9,111	36,112
<b>From Japan</b>	..	..	..	..	521	15,095	109,798

Italy has forged ahead in coloured goods and Switzerland in fine white goods. Japan has in all three classes made huge strides.

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## JAPAN.

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### JAPANESE EXPORTS OF COTTON CLOTH IN MARCH INCREASE OVER FEBRUARY.

Japanese exports of cotton cloth during March amounted to 149,274,026 square yards valued at 33,498,282 yen, which was an increase of 29,520,570 square yards and 5,607,470 yen compared with shipments during February, according to preliminary figures issued by the Japan Cotton Yarn and Cloth Exporters' Association.

### FABRIC PRODUCTION AND STOCKS REPORTED.

Mills belonging to the Japan Cotton Spinners' Association, representing over 90 per cent. of the spindles and approximately half of the power looms for goods wider than 15 inches in the entire Japanese cotton manufacturing industry, reported a production of 121,866,000 yards during February as against 122,410,000 in January.

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## POLAND SELLS TO SOVIET RUSSIA.

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According to an American cable, Lodz manufacturers are reported to have concluded contracts for the sale to Soviet Russia of textiles valued at about \$450,000. Credit ranging from 18 to 24 months is to be granted by the Lodz manufacturers, presumably with the aid of the Polish Government. Negotiations for further purchases of textiles to a total sum of \$1,000,000 are expected to be satisfactorily terminated in the near future, according to the trade press.

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*A. M. Dixon*, of Gastonia, N.C., is the newly elected President of the American Cotton Manufacturers' Association of Charlotte, N.C.

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*J. Cecil Finlay*, President of the Liverpool Cotton Association, and partner in Hibbert, Finlay & Hood, has accepted directorship of the Lancashire Cotton Corporation Limited, Manchester.

---

*Mr. H. G. Safford*, of Houston (Texas), is the newly appointed President of the American Cotton Shippers' Association.



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# COTTON TRADE STATISTICS

## AMERICAN COTTON MILLS' CONSUMPTION IN U.S.A.

April 30, 1929, with comparisons (Exclusive of Inters) (Including foreign growth.)								Per- cent- age this year is of 5-year aver-
Month	1913-14 Bales	1924-25 Bales	1925-26 Bales	1926-27 Bales	1927-28 Bales	1928-29 Bales	5-year average, 1923-24 to 1927-28 Bales	Per ct.
August . . . . .	432,350	357,380	451,236	500,253	634,520	526,729	487,174	108.2
September . . . . .	442,435	438,373	483,082	570,570	627,784	492,221	521,095	94.5
October . . . . .	511,923	534,283	544,097	568,361	613,320	618,788	560,704	110.4
November . . . . .	456,356	495,182	543,488	583,746	626,742	610,884	556,372	109.8
December . . . . .	456,262	535,047	576,216	602,086	598,756	534,852	542,765	98.5
January . . . . .	517,299	589,725	582,315	603,242	586,142	668,889	587,978	113.7
February . . . . .	455,231	550,132	565,118	589,513	572,875	598,098	557,263	107.3
March . . . . .	493,354	583,674	635,806	693,081	581,325	632,808	595,763	106.2
April . . . . .	499,646	597,104	577,678	618,279	524,765	631,710	559,282	113.0
Total, 9 months . . . . .	4,264,856	4,676,900	4,959,126	5,330,031	5,306,459	5,313,979	4,968,396	107.0
May . . . . .	466,744	531,471	516,376	629,943	577,384	668,000	533,829	—
June . . . . .	446,145	493,765	518,607	659,841	510,399	—	506,527	—
July . . . . .	448,333	483,898	461,743	569,765	439,821	—	460,465	—
Total, 12 months . . . . .	5,626,078	6,186,034	6,455,852	7,189,585	6,834,063	—	6,468,217	—

## IMPORTS OF FOREIGN COTTON INTO U.S.A.

August 1, 1928, to April 30, 1929, with comparisons (500 lb. bales)								Per- cent- age this year is of 5-year aver-
Country of production	1913-14	1924-25	1925-26	1926-27	1927-28	1928-29	5-year average, 1923-24 to 1927-28	Per ct.
Egypt . . . . .	92,623	175,143	205,427	166,793	171,157	237,172	173,244	136.9
Peru . . . . .	10,136	10,333	13,715	16,258	17,770	12,831	15,882	83.4
China . . . . .	13,151	22,426	20,762	21,702	56,280	33,350	31,404	106.2
Mexico . . . . .	26,530	43,303	23,274	92,717	20,673	51,441	41,226	124.8
India . . . . .	4,964	15,086	12,588	11,221	17,883	30,624	16,249	188.5
Other countries . . . . .	670	2,934	1,893	2,181	1,561	2,418	2,025	119.4
Total . . . . .	148,074	269,225	277,659	310,872	285,324	367,836	279,530	131.6

## U.S.A. IMPORTS OF COTTON AND MANUFACTURES

FOR FOUR MONTHS 1928 AND 1929.  
(Department of Commerce, Washington)

		Four months ended April	
		1928	1929
Raw Cotton .. .. .	{ lbs.	69,822,361	108,154,295
	\$	16,565,094	26,749,075
Total cotton manufactures .. .	\$	23,062,493	23,449,149
Total cotton cloth .. .	{ sq. yds.	26,626,550	21,165,714
	\$	6,451,418	5,517,097
Unbleached .. .. .	{ sq. yds.	10,021,033	7,713,299
	\$	1,945,319	1,623,341
Bleached .. .. .	{ sq. yds.	5,215,352	3,491,194
	\$	1,020,231	691,239
Coloured .. .. .	{ sq. yds.	11,390,165	9,961,221
	\$	3,485,868	3,202,517
Total cotton wearing apparel.. .	\$	5,103,126	5,100,920
Cotton gloves .. .. .	{ doz. prs.	720,440	482,288
	\$	2,364,802	1,386,909
Cotton hosiery .. .. .	{ doz. prs.	295,393	416,386
	\$	1,032,998	1,318,779
Total cotton laces, embroidery, etc ..	\$	3,918,311	4,388,817
Hand-made laces .. .. .	\$	283,299	295,360
Machine-made laces .. .. .	\$	1,568,435	2,137,399

## U.S.A. EXPORTS OF COTTON, COTTON CLOTH, YARNS (THREADS AND HOSIERY)

FOR FOUR MONTHS, 1928 AND 1929  
(Department of Commerce, Washington).

		Four months ended April	
		1928	1929
Lint cotton .. .. .	{ Bales	2,401,803	2,411,566
	\$	252,418,298	253,355,341
Cotton manufactures, total .. .	\$	42,040,394	51,085,675
Cotton cloths, total .. .. .	{ sq. yds.	157,657,374	220,114,264
	\$	23,715,670	30,530,947
Tyre fabrics .. .. .	{ sq. yds.	2,240,027	2,393,497
	\$	858,141	1,062,593
Cotton duck .. .. .	{ sq. yds.	4,577,362	5,636,831
	\$	1,578,463	1,848,581
Other cotton cloths :			
Unbleached .. .. .	{ sq. yds.	30,553,956	53,816,850
	\$	2,906,156	4,855,165
Bleached .. .. .	{ sq. yds.	28,433,060	35,968,757
	\$	3,171,670	4,225,694
Coloured .. .. .	{ sq. yds.	91,852,969	122,298,329
	\$	15,201,240	18,538,914
Cotton yarn, thread, etc. .			
Carded yarn .. .. .	{ lbs.	4,263,064	5,211,982
	\$	1,579,633	1,747,476
Combed yarn .. .. .	{ lbs.	4,097,124	4,976,546
	\$	3,380,927	4,008,635
Sewing, crochet, darning and embroidery .. .. .	{ lbs.	407,740	437,828
	\$	404,539	402,873
Cotton hosiery .. .. .	{ doz. prs.	1,478,859	1,613,016
	\$	2,627,718	2,746,432

## COTTON YARN EXPORTS FROM ENGLAND

	May		Five months ended May 31	
	lb	£	lb.	£
1913 . . . . .	17,776,700	1,276,637	89,422,300	6,330,143
1927 . . . . .	22,817,600	2,416,387	89,581,500	9,872,284
1928 . . . . .	14,066,800	1,922,675	72,708,900	9,757,658
1929 . . . . .	16,026,000	2,023,068	73,322,600	9,428,370

## COTTON YARN EXPORTS FOR FIVE MONTHS ENDED MAY 31.

	1927	1928	1929
	lbs.	lbs.	lbs.
Russia . . . . .	90,500	124,000	175,600
Sweden . . . . .	570,000	886,500	596,000
Norway . . . . .	1,362,800	1,544,300	1,343,300
Denmark . . . . .	479,300	621,900	613,200
Poland (including Dantzic) . . . . .	957,300	1,216,300	1,147,800
Germany . . . . .	23,042,200	19,938,900	17,167,500
Netherlands . . . . .	20,440,500	14,018,900	13,973,900
Belgium . . . . .	4,425,800	2,710,500	2,514,700
France . . . . .	1,680,000	1,636,200	2,620,400
Switzerland . . . . .	4,181,900	4,274,700	3,358,200
Italy . . . . .	230,200	378,000	714,900
Austria . . . . .	477,400	524,200	580,700
Czecho-Slovakia . . . . .	1,034,400	1,467,400	1,401,300
Serb-Croat-Slovene State . . . . .	1,104,800	768,200	844,700
Bulgaria . . . . .	1,484,900	1,054,800	662,900
Roumania . . . . .	4,513,100	2,535,000	1,890,300
Turkey . . . . .	427,200	300,300	204,900
China (including Hong Kong) . . . . .	498,900	624,600	1,121,100
United States of America . . . . .	1,534,600	1,055,000	1,123,300
Brazil . . . . .	979,200	1,080,400	1,628,900
Argentine Republic . . . . .	863,600	997,200	890,500
British India :			
Bombay, via Karachi . . . . .	279,400	312,000	204,600
" " Other Ports . . . . .	4,908,700	2,689,600	3,579,200
" Total . . . . .	5,188,100	3,001,600	3,783,800
Madras . . . . .	2,500,800	2,611,500	4,447,300
Bengal, Assam, Bihar and Orissa . . . . .	2,762,300	1,813,900	1,761,800
Burmah . . . . .	417,100	542,900	307,200
Straits Settlements and Malay States . . . . .	173,100	104,100	121,300
Australia . . . . .	2,195,800	1,788,900	2,188,900
Canada . . . . .	716,200	692,000	714,000
Other Countries . . . . .	5,249,500	4,396,700	5,424,200
Counts { Up to 40's . . . . .	48,439,300	33,181,000	32,893,900
Over 40's up to 80's . . . . .	30,039,400	27,877,500	29,881,400
Over 80's up to 120's . . . . .	9,904,600	10,147,000	9,174,500
Over 120's . . . . .	1,198,200	1,503,400	1,372,800
Grey, Unbleached . . . . .	80,056,200	64,340,500	64,987,900
Bleached and Dyed . . . . .	9,525,300	8,368,400	8,334,700
Total . . . . .	89,581,500	72,708,900	73,322,600

## PRINCIPAL INCREASES THIS YEAR COMPARED WITH LAST (lb. in 1,000's)

Madras . . . . .	1,835	China (including Hong Kong) . . . . .	496
France . . . . .	984	Australia . . . . .	400
Bombay . . . . .	782	Italy . . . . .	337
Brazil . . . . .	549		

## STATISTICS

## CHIEF DECREASES :

Germany .. .. .	2,771	Bulgaria .. .. .	392
Switzerland .. .. .	917	Sweden .. .. .	291
Roumania .. .. .	645	Burmah .. .. .	236

## COTTON CLOTH EXPORTS FROM ENGLAND.

		May		Five months ended May 31	
		Linear yds.	£	Linear yds.	£
1913	.. .. .	606,254,300	8,304,705	2,967,231,200	40,266,347
1927	.. .. .	418,991,800	10,036,614	1,766,226,200	45,226,713
1928	.. .. .	299,529,800	8,013,589	1,691,393,500	45,624,127
1929	.. .. .	332,370,100	8,927,832	1,751,261,700	45,837,636

## COTTON CLOTH EXPORTS FOR FIVE MONTHS ENDED MAY 31

			1927	1928	1929
			sq. yds.	sq. yds.	sq. yds.
Sweden .. .. .	.. .. .	.. .. .	11,061,000	11,204,700	7,916,300
Norway .. .. .	.. .. .	.. .. .	7,446,800	7,705,700	7,127,800
Denmark .. .. .	.. .. .	.. .. .	10,822,500	10,028,600	10,796,500
Germany .. .. .	.. .. .	.. .. .	33,735,900	28,321,800	21,106,900
Netherlands .. .. .	.. .. .	.. .. .	25,092,100	33,182,300	29,610,700
Belgium .. .. .	.. .. .	.. .. .	13,863,500	11,509,900	12,305,600
France .. .. .	.. .. .	.. .. .	5,511,100	6,646,900	4,234,400
Switzerland .. .. .	.. .. .	.. .. .	51,230,500	66,278,900	40,687,400
Portugal, Azores and Madeira .. .. .	.. .. .	.. .. .	7,219,300	5,949,700	6,379,200
Italy .. .. .	.. .. .	.. .. .	3,872,100	5,774,700	5,851,800
Greece .. .. .	.. .. .	.. .. .	15,207,800	15,822,600	15,759,700
Roumania .. .. .	.. .. .	.. .. .	9,479,200	8,916,500	5,812,400
Turkey .. .. .	.. .. .	.. .. .	31,230,600	26,562,100	25,019,600
Syria .. .. .	.. .. .	.. .. .	15,226,900	9,664,500	11,414,000
Egypt .. .. .	.. .. .	.. .. .	62,376,800	49,471,900	72,673,000
Morocco .. .. .	.. .. .	.. .. .	16,926,900	21,388,400	25,078,800
Foreign West Africa .. .. .	.. .. .	.. .. .	18,296,000	24,092,800	21,753,500
Foreign East Africa .. .. .	.. .. .	.. .. .	4,472,600	7,035,400	7,669,700
Iraq .. .. .	.. .. .	.. .. .	32,734,200	21,237,000	20,765,600
Persia .. .. .	.. .. .	.. .. .	9,628,100	8,339,600	9,381,100
Dutch East Indies .. .. .	.. .. .	.. .. .	57,697,500	60,570,000	58,928,600
Philippine Islands and Guam .. .. .	.. .. .	.. .. .	5,317,700	4,238,800	5,052,300
Siam .. .. .	.. .. .	.. .. .	10,758,000	7,648,900	13,122,100
China .. .. .	.. .. .	.. .. .	42,901,200	45,338,000	78,483,000
Japan .. .. .	.. .. .	.. .. .	5,205,200	3,834,100	4,578,400
United States of America .. .. .	.. .. .	.. .. .	21,453,100	18,131,700	14,974,600
Cuba .. .. .	.. .. .	.. .. .	5,849,100	3,970,100	8,447,600
Mexico .. .. .	.. .. .	.. .. .	4,742,000	5,186,800	5,935,900
Central America .. .. .	.. .. .	.. .. .	4,437,300	5,640,500	6,215,500
Columbia .. .. .	.. .. .	.. .. .	17,098,100	13,990,300	21,365,300
Venezuela .. .. .	.. .. .	.. .. .	7,826,600	7,239,200	15,209,700
Ecuador .. .. .	.. .. .	.. .. .	2,358,800	2,074,800	3,081,200
Peru .. .. .	.. .. .	.. .. .	5,025,500	4,190,600	5,395,600
Chile .. .. .	.. .. .	.. .. .	14,151,200	8,722,200	15,476,500
Brazil .. .. .	.. .. .	.. .. .	22,720,900	20,531,300	31,197,500
Uruguay .. .. .	.. .. .	.. .. .	6,001,000	7,623,900	7,734,100
Bolivia .. .. .	.. .. .	.. .. .	919,900	1,332,800	1,567,100
Argentine Republic .. .. .	.. .. .	.. .. .	45,490,900	59,268,600	54,725,300
British West Africa .. .. .	.. .. .	.. .. .	54,580,200	54,917,600	48,704,200
British South Africa .. .. .	.. .. .	.. .. .	26,086,500	28,427,900	29,987,700
British East Africa .. .. .	.. .. .	.. .. .	5,989,100	7,760,200	9,005,100

# STATISTICS

705

Cotton Cloth Exports for Five months ended May 31—continued.

	1927 sq. yds.	1928 sq. yds.	1929 sq. yds.
British India :			
Bombay, via Karachi .. .. .	160,904,500	168,331,000	120,356,300
„ „ Other Ports .. .. .	120,190,200	158,259,300	135,213,300
„ Total .. .. .	281,094,700	326,590,300	255,569,600
Madras .. .. .	34,083,900	31,806,800	44,022,300
Bengal, Assam, Bihar and Orissa .. .. .	413,605,200	308,381,900	336,051,600
Burmah .. .. .	28,737,000	24,105,300	29,596,000
Straits Settlements and Malay States .. .. .	32,988,500	22,408,100	38,893,400
Ceylon .. .. .	12,669,300	12,938,300	11,833,100
Hong Kong .. .. .	11,804,500	14,436,100	23,563,600
Australia .. .. .	70,157,700	56,831,300	65,200,300
New Zealand .. .. .	11,421,000	10,808,300	12,845,100
Canada .. .. .	21,006,700	18,350,400	17,387,500
British West India Islands and British Guiana .. .. .	7,776,960	7,464,200	5,753,000
Other countries .. .. .	68,200,900	70,783,500	69,000,600
Grey Unbleached .. .. .	556,327,900	467,036,600	486,779,400
Bleached .. .. .	596,223,700	576,780,500	614,781,400
Printed .. .. .	228,182,900	237,317,900	211,500,700
Dyed in the piece .. .. .	300,021,100	312,161,900	340,247,000
Manufactured of Dyed Yarn .. .. .	64,834,400	61,380,400	56,938,900
Total { Square yards .. .. .	1,745,590,000	1,654,677,300	1,710,247,400
{ Linear yards .. .. .	1,766,226,200	1,691,393,500	1,751,261,700
{ Cwts .. .. .	2,882,258	2,675,644	2,824,375

## PRINCIPAL INCREASES THIS YEAR COMPARED WITH LAST

(sq. yds. in 1,000's).

China .. .. .	33,145	Brazil .. .. .	10,667
Bengal, Assam, Bihar and Orissa .. .. .	27,670	Hong Kong .. .. .	9,128
Egypt .. .. .	23,201	Australia .. .. .	8,368
Straits Settlements and Malay States .. .. .	16,485	Venezuela .. .. .	7,971
Madras .. .. .	12,215	Colombia .. .. .	7,375
		Chile .. .. .	6,755
		Burmah .. .. .	5,491

## CHIEF DECREASES

Bombay .. .. .	71,020	Netherlands .. .. .	3,571
Switzerland .. .. .	25,592	Sweden .. .. .	3,289
Germany .. .. .	7,215	United States of America .. .. .	3,157
British West Africa .. .. .	6,214	Roumania .. .. .	3,105
Argentine Republic .. .. .	4,544	France .. .. .	2,413

## EXPORTS OF COTTON PIECE GOODS OF ALL KINDS FROM THE UNITED KINGDOM

Description	Twelve months ended March 31		Percentage		Percentage increase + or decrease — in 1928–29 compared with 1927–8
	1928	1929	of total	of total	
	Thousand sq. yds.	Thousand sq. yds.			
Grey .. .. .	1,323,595	1,066,927	31·9	27·7	— 19·4
Bleached .. .. .	1,334,727	1,375,661	32·1	35·7	+ 3·1
Printed .. .. .	589,735	518,198	14·2	13·4	— 12·1
Dyed .. .. .	754,446	754,254	18·2	19·6	— ·03
Coloured cottons .. .. .	150,322	139,967	3·6	3·6	— 6·9
Total .. .. .	4,152,825	3,855,007	100·0	100·0	— 7·2

## EXPORTS OF BLEACHED COTTON PIECE GOODS FROM THE UNITED KINGDOM

Twelve months ended March 31, 1929

Continent	Thousand sq. yds.	per cent of total
Europe .. .. .	42,361	3.1
Asia .. .. .	877,609	63.8
Africa .. .. .	222,127	16.1
America (North and South) .. .. .	136,609	9.9
Australasia .. .. .	42,526	3.1
Unallocated .. .. .	54,429	4.0
Total exports .. .. .	<u>1,375,661</u>	<u>100.0</u>

## IMPORTS OF COTTON GOODS INTO COLOMBIA FROM ENGLAND

	sq. yds.	£
1927 ..	3,924,900	129,952
1928 ..	3,413,000	115,471
1929 ..	3,853,300	116,874

## INDIA.—IMPORTS AND EXPORTS OF COTTON PIECE GOODS DURING FIRST QUARTER, 1929.

(Quantities in 1,000 yards.)

Classes	United Kingdom	Japan	United States	Switzerland	Italy	All countries
Cotton piece goods						
Total .. .. .	73,866	48,078	6,747	3,461	3,602	142,330
Unbleached .. .. .	12,639	36,799	196	—	—	54,143
Bleached .. .. .	26,829	222	308	1,166	84	29,524
Printed .. .. .	16,389	4,762	6	29	140	21,351
Dyed .. .. .	11,488	1,860	1,181	143	512	15,277
Woven coloured .. .. .	2,110	2,924	7	4	296	5,522

The foregoing table includes 213,000 yards of canvas, 8,117,000 yards of cotton and silk mixtures, and 8,184,000 yards of fents, details of which are not available by countries.

Exports of Indian-made piece goods from Bombay during the first three months of 1929 were as follows:—

Exported to	yards	Exported to	yards
Red Sea ports .. .. .	3,788,299	Ceylon and Straits .. .. .	1,391,247
East Africa .. .. .	9,730,989	Egypt and North Africa .. .. .	302,400
Persian Gulf ports .. .. .	12,831,015	South Africa .. .. .	896,701
European countries .. .. .	155,840	Other countries .. .. .	53,523
Levant and Black Sea ports .. .. .	163,400	Total .. .. .	<u>29,313,414</u>

## COTTON YARN PRODUCTION IN INDIA

FOR 11 MONTHS ENDING FEBRUARY, 1927, 1928 AND 1929,  
IN ENGLISH LBS, DETAILED PER COUNT.

GRAND TOTAL, INDIA (BRITISH INDIA AND INDIAN STATES)

				Eleven months, April to February		
Count or Number				1926-27	1927-28	1928-29
1	..	..	..	5,632,292	8,646,670	3,180,877
2	..	..	..	9,200,031	6,976,327	5,329,095
3	..	..	..	2,619,700	1,971,664	1,190,700
4	..	..	..	7,661,754	7,899,481	5,897,811
5	..	..	..	2,055,504	2,582,886	2,160,109
6	..	..	..	8,869,658	9,108,859	7,472,646
7	..	..	..	20,471,646	19,347,257	13,839,400
8	..	..	..	9,517,262	9,914,377	5,868,629
9	..	..	..	14,757,716	14,602,186	10,326,450
10	..	..	..	24,675,660	18,238,050	14,791,626
Total, Nos. 1 to 10				105,461,223	99,287,757	70,557,343
11	..	..	..	42,007,846	31,464,675	26,015,276
12	..	..	..	28,212,633	27,089,123	19,848,019
13	..	..	..	24,486,799	24,104,448	20,639,396
14	..	..	..	30,634,632	31,125,887	21,399,533
15	..	..	..	19,725,241	21,218,530	15,794,241
16	..	..	..	31,586,923	30,880,288	26,094,602
17	..	..	..	16,554,739	17,147,167	11,242,030
18	..	..	..	21,045,944	22,178,132	19,593,903
19	..	..	..	13,787,352	13,502,435	11,612,055
20	..	..	..	138,495,438	140,661,021	101,093,933
Total, Nos. 11 to 20				366,537,547	359,371,706	273,332,990
21	..	..	..	52,945,013	54,734,573	40,256,764
22	..	..	..	41,994,446	48,853,457	39,715,020
23	..	..	..	8,291,735	8,916,713	6,764,691
24	..	..	..	47,530,854	52,428,980	35,375,873
25	..	..	..	2,747,151	3,240,209	2,818,839
26	..	..	..	14,205,471	13,510,161	11,552,812
27	..	..	..	5,592,055	5,054,151	3,123,345
28	..	..	..	13,104,283	13,234,924	12,394,374
29	..	..	..	2,229,110	2,189,337	2,074,004
30	..	..	..	37,801,206	40,025,075	36,744,373
Total, Nos. 21 to 30				226,441,324	242,188,080	190,820,095
31	..	..	..	1,621,897	1,437,097	1,972,576
32	..	..	..	9,997,858	12,252,148	13,143,683
33	..	..	..	1,330,395	1,529,757	803,497
34	..	..	..	1,609,776	1,748,002	1,847,304
35	..	..	..	452,645	159,947	117,448
36	..	..	..	1,727,054	2,542,163	1,168,143
37	..	..	..	21,353	24,718	233,618
38	..	..	..	231,379	368,107	169,065
39	..	..	..	6,095	2,950	63,522
40	..	..	..	8,178,039	10,725,165	14,085,264
Total, Nos. 31 to 40				25,176,491	30,790,054	33,604,120
Above 40				10,503,396	10,345,813	9,058,841
Wastes, etc.				3,356,027	5,642,178	5,188,105
GRAND TOTAL				737,476,008	747,625,588	582,561,494

The effect of the Bombay Mill Strike is clearly visible.

## COTTON CLOTH PRODUCTION IN INDIA

(IN ENGLISH LBS. AND EQUIVALENTS IN YARDS) FOR 11 MONTHS  
ENDING FEBRUARY, 1927, 1928 AND 1929.

GRAND TOTAL, INDIA (BRITISH INDIA AND INDIAN STATES)

Description	Eleven Months, April to February		
	1926-27	1927-28	1928-29
Grey and bleached piece goods :			
Chadars .. ..	lbs. 22,622,207 ..	24,146,865 ..	19,069,547
	yds. 61,123,553 ..	62,491,756 ..	52,680,191
Dhutis .. ..	lbs. 112,870,223 ..	119,917,094 ..	104,350,189
	yds. 538,938,388 ..	569,163,476 ..	510,663,850
Drills and jeans ..	lbs. 18,057,308 ..	20,622,449 ..	16,849,539
	yds. 71,398,308 ..	82,112,741 ..	67,380,967
Cambrics and lawns ..	lbs. 607,137 ..	880,013 ..	714,800
	yds. 3,058,307 ..	4,908,928 ..	4,344,434
Printers .. ..	lbs. 4,423,446 ..	4,258,830 ..	4,429,192
	yds. 19,117,263 ..	18,605,148 ..	20,782,282
Shirtings and longcloth	lbs. 122,851,139 ..	130,262,035 ..	96,598,080
	yds. 529,261,525 ..	571,835,567 ..	425,611,078
T-cloth, domestics, and	lbs. 21,478,527 ..	22,812,329 ..	17,744,816
sheetings .. ..	yds. 84,847,442 ..	84,857,470 ..	67,741,425
	lbs. 2,930,967 ..	2,324,928 ..	2,724,691
Tent cloth .. ..	yds. 6,222,723 ..	5,450,540 ..	6,404,683
Khadi, Dungri or	lbs. 33,676,819 ..	39,441,146 ..	29,194,848
Khaddar .. ..	yds. 92,481,011 ..	110,040,932 ..	86,564,146
	lbs. 10,377,791 ..	9,140,284 ..	7,589,555
Other sorts .. ..	yds. 38,574,134 ..	37,798,363 ..	30,939,047
Total .. ..	lbs. 349,895,564 ..	373,805,973 ..	99,265,257
	yds. 1,445,022,654 ..	1,547,264,921 ..	1,273,112,103
Coloured piece goods ..	lbs. 132,674,652 ..	136,798,467 ..	91,031,938
	yds. 621,107,200 ..	624,170,775 ..	428,492,423
Grey and coloured goods,	lbs. 3,819,302 ..	3,796,887 ..	2,879,008
other than piece goods	doz. 904,186 ..	883,468 ..	672,368
	lbs. 890,406 ..	1,105,324 ..	1,357,672
Hosiery .. ..	doz. 316,179 ..	399,454 ..	409,545
Miscellaneous .. ..	lbs. 3,958,393 ..	5,432,028 ..	3,942,315
Cotton goods mixed with			
silk or wool .. ..	lbs. 2,040,620 ..	4,433,888 ..	2,874,004
GRAND TOTAL	lbs. 493,278,937 ..	525,372,567 ..	401,350,194
	yds. 2,066,123,854 ..	2,171,435,696 ..	1,701,604,526
	doz. 1,220,365 ..	1,282,922 ..	1,081,913

The effect of the Bombay Mill Strike is clearly visible.

## CONSUMPTION OF INDIAN COTTON IN INDIA.

	Consump- tion during March 1929	Consump- tion during Feb. 1929	Consump- tion during March 1928	Since Sept. 1 1928 to March 31 1929	During correspond- ing period last year (Since Sept. 1, 1927)
Bombay Island ..	60,192	49,141	56,354	337,059	388,153
Ahmedabad ..	26,645	25,514	24,404	184,160	172,849
Bombay Presidency ..	101,716	90,158	93,860	623,428	658,639
Madras Presidency ..	17,237	16,552	15,464	112,869	108,828
United Provinces ..	12,949	13,391	13,035	103,104	102,056
Central Provinces and Berar .. ..	10,135	9,390	9,855	70,079	67,167
Bengal .. ..	7,357	7,139	7,083	47,786	51,684
Punjab and Delhi ..	3,975	4,062	3,983	30,957	28,052
Rest of British India	1,842	1,841	998	12,498	6,837
Total, British India	155,211	142,533	144,278	1,000,721	1,023,263

# WORLD'S TOTAL COTTON CROPS.

(Source : *Foreign Crops and Markets, Washington, D.C.*)

## PRODUCTION :

AVERAGE 1909-10 TO 1913-14 ; ANNUAL 1926-27 TO 1928-29.

(Bales of 478 lbs. net.)

Country	Average 1909-10 to 1913-14	1926-27	1927-28	1928-29	Per cent. 1928-29 is of 1927-28
Production	1,000 bales	1,000 bales	1,000 bales	1,000 bales	Per cent.
United States ..	13,033	17,977	12,955	14,478	111.8
India .. ..	3,585	4,205	4,680	4,718	100.8
China .. ..	695	1,584	2,000	1,550	77.5
Egypt .. ..	1,453	1,586	1,257	1,491	118.6
Russia (Asiatic) ..	905	755	973	1,208	124.1
Brazil .. ..	387	484	492	450	91.5
Mexico .. ..	187	360	179	272	152.0
Peru .. ..	110	258	251	200	79.6
Argentina .. ..	2	58	101	180	178.2
Persia .. ..	136	85*	180	180	100.0
Chosen .. ..	20	143	133	150	112.8
Anglo-Egyptian Sudan	14	131	111	144	130.6
Nigeria .. ..	9	23	17	28	164.7
Tanganyika .. ..	8†	20	13	20	153.8
Greece .. ..	13	18	14	15	107.1
Syria and Lebanon	—	8	11	7	63.6
Mozambique .. ..	—	2	7	6	85.7
Algeria .. ..	1‡	8	4	5	125.0
Iraq .. ..	—	3	1	5	500.0
Bulgaria .. ..	1	2	4	4	100.0
Total above countries	20,559	27,710	23,383	25,111	107.4
Estimated World Total including China	20,900	28,300	23,800	25,600	

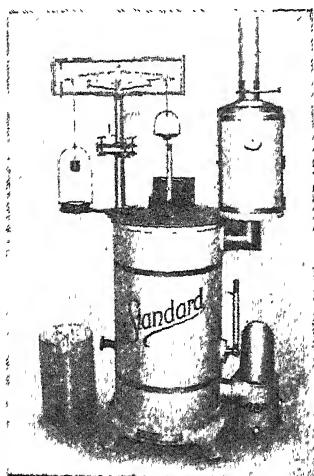
\* Exports.

† Four-year average.

‡ Three-average.



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Monthly production: 7,500,000 lbs. cotton yarn

We sell nearly the whole yarn production of Belgium;  
yarns made of American and Indian Cotton.

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## Reviews on Current Cotton Literature.

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"WORLD TRADE" is the name of the quarterly review in three languages published by the International Chamber of Commerce, Paris, at the very modest price of 1s. It is a great addition to the economic journals.

DE VESTIGINGSFACTOREN DER KATOENINDUSTRIE IN DE VEREENIGDE STATEN VAN NOORD-AMERIKA, by Dr. J. Wisselink. This book of 470 pages, written in Dutch, deals with the organization of production in the industry, including costs. Unfortunately few of our members will be able to read this book, which, judging by its "contents," appears to be highly interesting.

The same author has also published a criticism of Mr. de Roos' book on "The Japanese Cotton Industry," in which he states that the Dutch Consul de Roos undervalues the efficiency of the Japanese mill operatives.

STATISTICAL INFORMATION CONCERNING COTTON SPINNING IN U.S.A. is a compilation of recent material published by the International Cotton Federation and by other organizations, brought out by the Cotton Yarn Association Ltd., Manchester, in January, 1929. It is a useful pamphlet, costing 6d. per copy.

"DESIGN AND MANUFACTURE OF TOWELS AND TOWELLING," by Thomas Woodhouse and Alexander Brand, published by Sir Isaac Pitman & Sons Ltd., London, at 12s. 6d. A text-book designed to interest those who have a knowledge of the general principles and practice of weaving. Special attention has been given to the designs. There are 173 illustrations in this book of 235 pages. It is a book which will appeal to the practical mill manager.

"ANNUARIO, 1928-1929." The "Confederazione Generale Facista dell'Industria Italiana," Rome, has issued its annual volume, which now comprises 901 pages. It is a monument of the activities of this powerful organization, to which Italian industry owes such a great debt of gratitude.

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### *Books Received:*

"ANNUAIRE STATISTIQUE INTERNATIONAL (INTERNATIONAL STATISTICAL YEAR BOOK), 1928, ECONOMIC AND FINANCIAL SECTION," published by the League of Nations, Geneva.

GIORNALE DEGLI ECONOMISTI E RIVISTA DI STATISTICA, April and May numbers.

"STUDIES ON THE INHERITANCE OF (a) PETAL SPOT, (b) POLLEN COLOUR AND (c) COROLLA COLOUR IN THE COTTON PLANT," by S. C. Harland. Memoirs of the Cotton Research Station, Trinidad. Copies may be obtained at 2s. 6d. from the Secretary, Empire Cotton Growing Corporation, Millbank, London, S.W.1.

"THE BRANCHING OF EGYPTIAN COTTON PLANTS," by J. Templeton, D.Sc., Senior Botanist, Ministry of Agriculture, Egypt. Technical and Scientific Service, Bulletin N.87, Price P.T.3.

"A REVIEW OF THE TRADE OF BRITISH MALAYA IN 1928," by L. C. Beale, C.B.E., His Majesty's Trade Commissioner. Published by the Department of Overseas Trade at 5s.

"ARTIFICIAL SILK," by Thomas Woodhouse, F.T.I., second edition, published by Sir Isaac Pitman & Sons Ltd., London, at 7s. 6d. net. The latest developments are explained in non-technical language. A feature of the work is the number of good illustrations.

"THE EMPIRE COTTON GROWING REVIEW" for July, Vol. IV, No 3. Published by P. S. King & Son, Ltd., London, at 1s. Spinners will be interested in the reprint from the *Illustrated London News* of 1855 showing the processes of spinning and weaving in Dacca, India.

"ECONOMIC CONDITIONS IN DENMARK, WITH ANNEX ON ICELAND," by H. H. Cassells, Commercial Secretary, British Legation, Copenhagen. Published by the Department of Overseas Trade, London, at 1s. 6d. net.

"THE ECONOMIC SITUATION IN CZECHO-SLOVAKIA, AS AT MARCH, 1929," by H. Kershaw, O.B.E., Commercial Secretary to His Majesty's Legation, Prague. Published by the Department of Overseas Trade, London, at 1s. 6d. net.

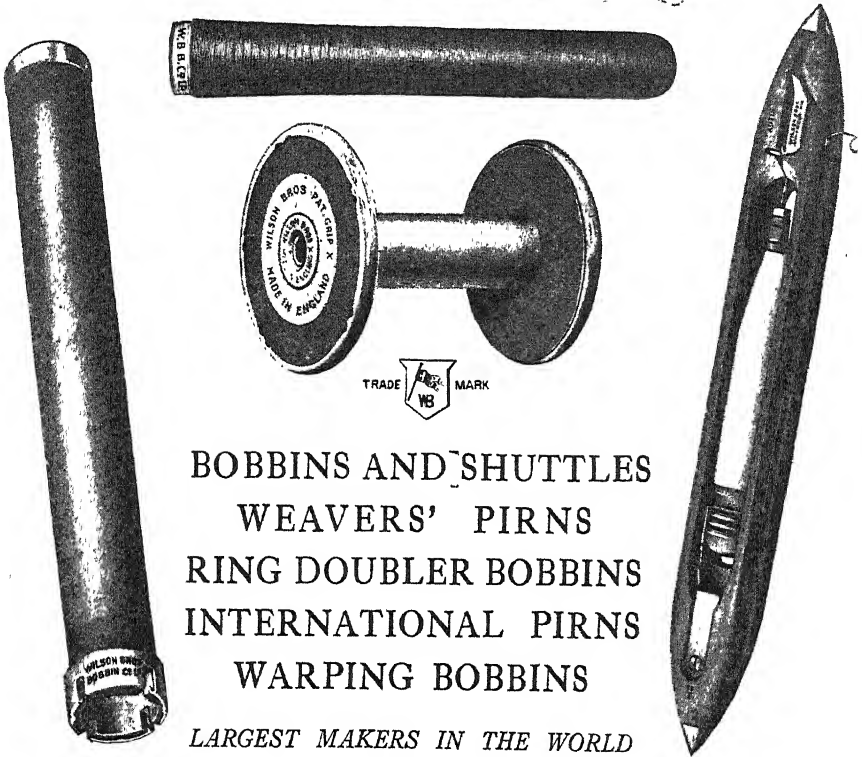
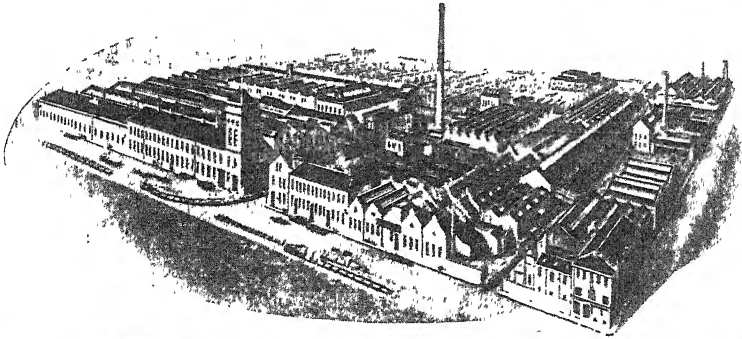
"ECONOMIC CONDITIONS IN FINLAND," by Cecil H. Mackie, His Majesty's Consul at Helsingfors. Published by the Department of Overseas Trade, London, at 1s. net.

"ECONOMIC CONDITIONS IN POLAND DURING 1928," by R. E. Kimens, C.M.G., Commercial Secretary to his Majesty's Legation, Warsaw. Published by the Department of Overseas Trade, London, at 1s. 6d. net.

"AUTOMATIC LOOMS," by William A. Hanton, M.Sc. (Tech.), Manchester. Published by Ernest Benn, Ltd., London, at 21s. net. A review of this book appears on page 677.



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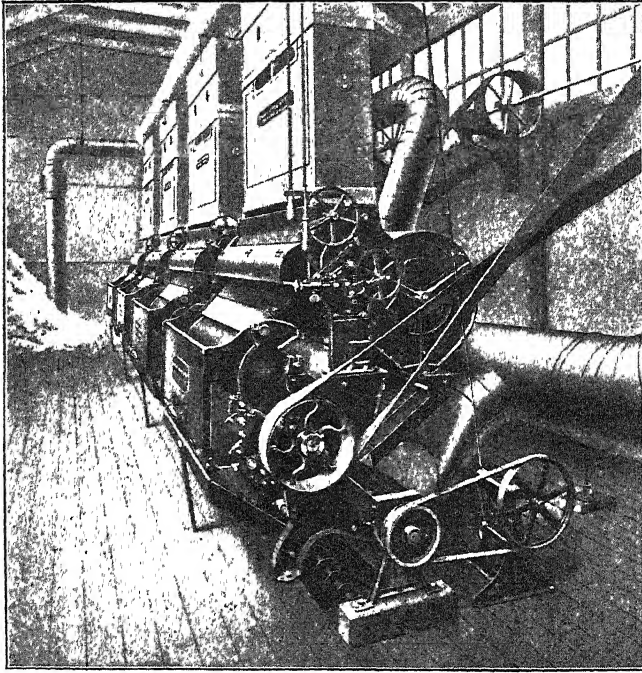
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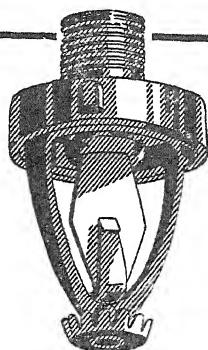
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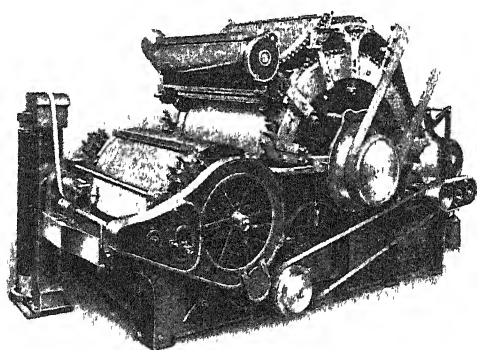
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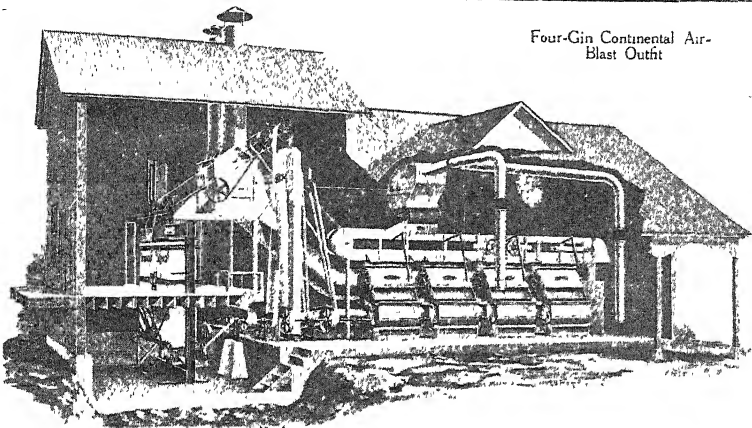
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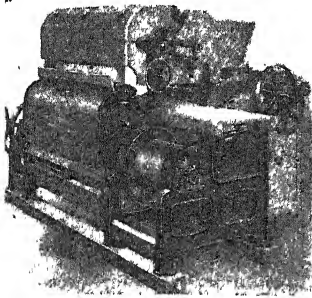
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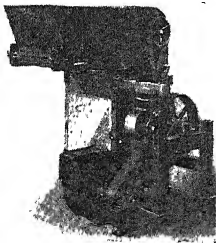
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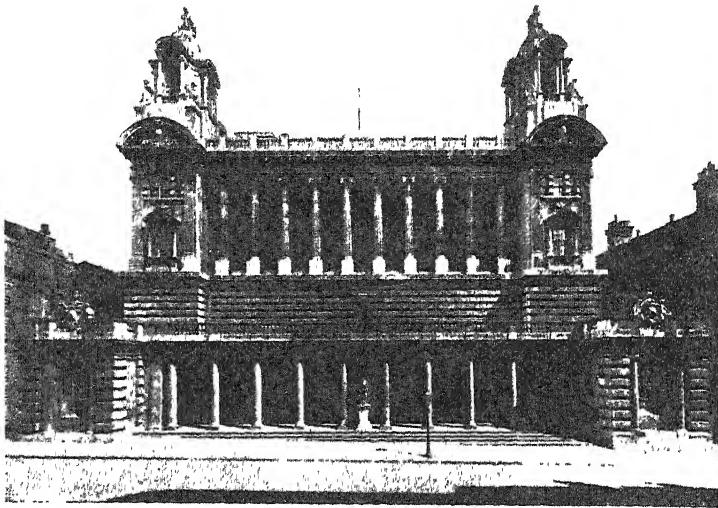
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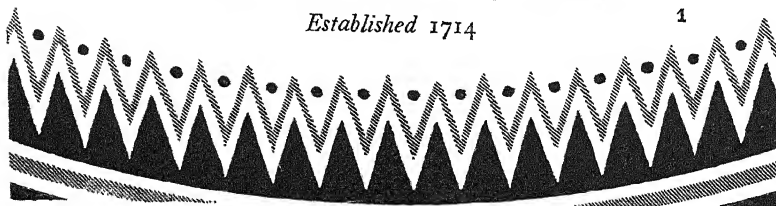
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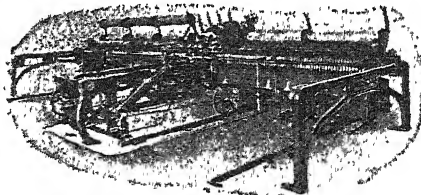
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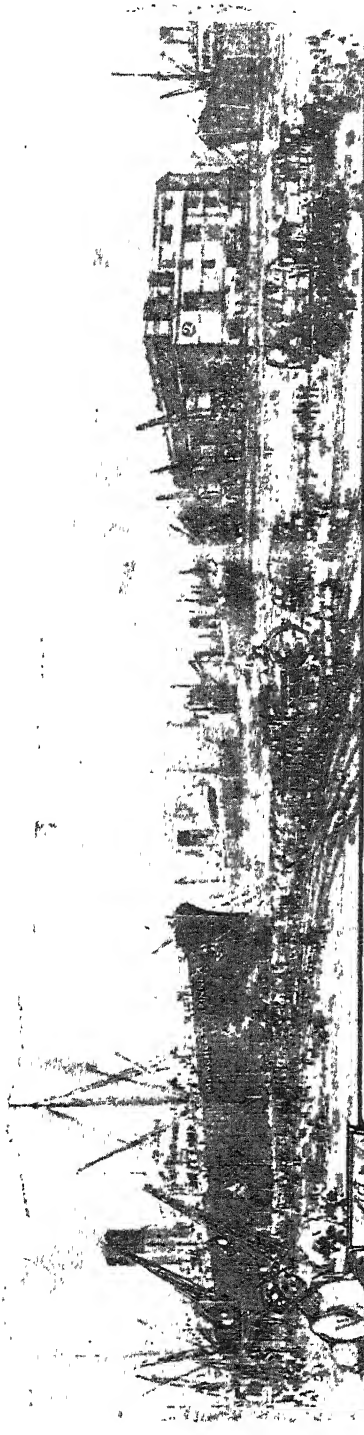
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